

LET THE REVOLUTION BEGIN, 140 CHARACTERS AT A TIME:

SOCIAL MEDIA AND UNCONVENTIONAL WARFARE

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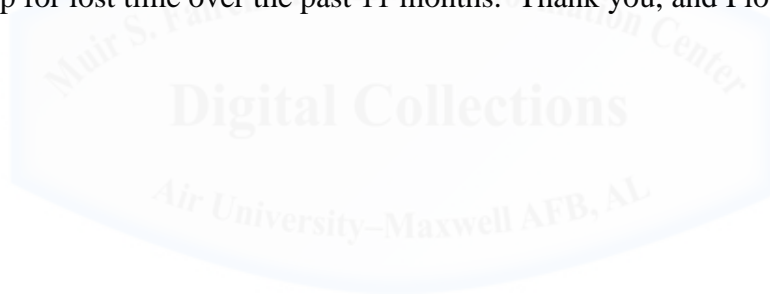
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## ABSTRACT

The rise of the Islamic State of Iraq and Syria (ISIS), or al-Dawla al-Islamiya fi al-Iraq wa al-Sham (DAIISH), has been attributed to the group's ability to exploit social media to spread propaganda, control beliefs, recruit, preach, and broadcast ambitions. As a means to influence and motivate others to act on their behalf, DAIISH's use of social media is similar to the principles enshrined in U.S. military unconventional warfare (UW) doctrine. Although DAIISH is not the focus of this thesis, for a variety of reasons, this thesis seeks to answer the research question: "What are the common elements between, implications of, and recommendations for social media and UW?" Answering this question involves two sets of analysis. The first is an analysis of concepts between social media and UW to determine where they converge. The two phenomena are more alike than not. The second is a comparative analysis of two case studies: the January 25 Revolution and the 2014 Hong Kong protests, which assesses the effectiveness of social media as a tool of political activism and resistance. Social media were used in both cases with different results, and this thesis assesses their relative success and failure according to the principles of UW. Other recent examples suggest the line distinguishing social media and UW is disappearing. For example, Russia relied heavily on social media in support of its UW campaign that resulted in its annexation of the Crimean peninsula. In addition, North Korea conducted a cyber UW campaign against Sony Pictures Entertainment, augmented by social media. The author concludes his study with a number of recommendations that span integrating social media more closely into military operations to changing how Special Forces (SF) recruit, train, and organize to conduct and combat UW.

## CONTENTS

### Chapter

	DISCLAIMER.....	ii
	ABOUT THE AUTHOR.....	iii
	ACKNOWLEDGEMENTS.....	iv
	ABSTRACT.....	v
1	INTRODUCTION.....	1
2	DEFINING SOCIAL MEDIA, UNCONVENTIONAL WARFARE, AND THE AUTHOR’S THEORY.....	7
3	JANUARY 25 REVOLUTION CASE STUDY.....	21
4	2014 HONG KONG PROTESTS CASE STUDY.....	37
5	CONCLUSION.....	49
	BIBLIOGRAPHY.....	60

## Chapter 1

### Introduction

#### **Statement of the Research Question**

ISIS, or DAIISH, can attribute much of its dramatic rise in power since 2006 to its multi-purposed social media usage.<sup>1</sup> DAIISH has established media institutes, centers, and foundations to broadcast its propaganda, recruiting, and strategy messages across multiple languages and mediums. The group has placed more emphasis on social media than any other violent Islamic extremist organization, while quickly adapting to national attempts made to silence its social media voice. Its followers have also discovered numerous ways to exploit technologies and further group goals. The number of recruits who have flocked to the Middle East reflects, in part, the sheer scale and sophistication of DAIISH's social media usage. During a 19 November 2014 meeting, the member states of the United Nations Security Council expressed concern over the more than 15,000 foreign terrorist fighters from over 80 nations who have travelled to join DAIISH, and others, in Syria, Iraq, Somalia, Yemen and countries in the Maghreb and Sahel regions.<sup>2</sup> Unlike other groups, DAIISH cleverly recruits women to join in their fight to expand the self-proclaimed caliphate. Both the number of foreign fighters, and the number of women joining the group, owes much to DAIISH's propaganda efforts through social media. Naturally, the United States (U.S.) wants to silence the social media voice giving the terrorist organization its power. DAIISH has used social media as a means to influence and motivate others to act on their behalf, similar to UW's conduct.

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1. Throughout this thesis, DAIISH will be the nomenclature used to refer to the terrorist organization also known as the Islamic State of Iraq and Syria, or ISIS; the Islamic State of Iraq and the Levant, or ISIL; and the Islamic State, or IS. DAIISH is a more accurate Arabic shorthand for the group's Arabic name, but is also less-commonly used among English-language press. For details, see Ishaan Tharoor, "ISIS or ISIL? The Debate Over What to Call Iraq's Terror Group," *The Washington Post*, 18 June 2014, <http://www.washingtonpost.com/blogs/worldviews/wp/2014/06/18/isis-or-isil-the-debate-over-what-to-call-iraqs-terror-group/> (accessed 17 May 2015).

2. United Nations, "In Presidential Statement, Security Council Calls for Redoubling Efforts to Target Root Causes of Terrorism as Threat Expands, Intensifies," Meetings Coverage and Press Releases, 19 November 2014, <http://www.un.org/press/en/2014/sc11656.doc.htm> (accessed 17 May 2015).

Discrediting, countering, and stopping DAIISH's global influence first requires an understanding of the connections between social media and UW. Therefore, this thesis asks the research question: "What are the common elements between, implications of, and recommendations for social media and UW?"

### **Background of the Research Question**

The World Wide Web grew exponentially out of a need for information sharing among international physicists in 1984. Although personal websites existed during the early stages of the Advanced Research Projects Agency network, or ARPANet, server performance and bandwidth availability constraints limited the quality and content of information exchanges. Internet users did not realize a new era of information exchange until 2002, when social web interactions grew under Web 2.0. Web 2.0, which saw the shift from desktop-based content creation to web-based content creation, changed social interactions virtually from passive viewing of static sites to interactive participation with dynamic content. Changes in web applications and use led to the creation of social networking websites such as Myspace in 2003, Facebook in 2004, and Twitter in 2006, as well as video-sharing and content-storing websites such as YouTube in 2005. The evolution of such websites, combined with the widespread availability and cheaper costs of Internet or wireless access and service, means social media technologies of the early 21st century provide a new means of rapidly creating and almost instantaneously sharing information and ideas. Social media applications have, in effect, shrunk the world and created new levels of reach, accessibility, and usability for users globally.

The Arab world began testing social media's information sharing, virtual network creation, and user interaction potential in 2010, while still a relatively young technology. Beginning in Tunisia, a wave of protests, coups, civil wars, and demonstrations spread throughout North Africa and the Middle East, with social media enabling collective political action despite a state monopoly on traditional media outlets and attempts to deny Internet access. Labeled the "Arab Spring," these revolutionary movements began out of dissatisfaction with the status quo, and resulted in the dissolution of ruling parties, resignation of political leaders, and overthrow of many governments within the Arab world. These movements also introduced widespread violence, economic decline within



the Arab League, and regional instability, and have further inflamed the sectarian conflicts between Sunni and Shia Muslims in the region. Arguably, social-media enabled revolutions affected Egypt the most. Overthrown twice since the January 25 Revolution in 2011, its government still experiences levels of violence today.

The 2014 Hong Kong protests provide another recent example where social media has enabled collective political activism. The protests, also known as the “Umbrella Revolution,” represented part of a civil-disobedience movement where students frequently used umbrellas to protect themselves from police pepper spray. Predominantly young protesters continued demanding the current Hong Kong chief executive’s resignation, as well as election rights for the head of the Hong Kong government, instead of vetting them through Beijing. Since Hong Kong’s past as a British territory has conferred it certain Western freedoms, Hong Kong students believed the former colony should have political autonomy as well. However, Chinese Communist Party (CCP) leaders refused to relinquish firm political control of Hong Kong because of fears democracy might spread throughout China. A significant generational divide exists among the Chinese population of Hong Kong, with the movement’s societal disruption disturbing older generations, who also worry Beijing provocation might result in Hong Kong’s loss of current freedoms. Social media has not only played a role in mobilizing support, it has also enabled international messaging and acted as a news source. This is important for Hong Kong citizens, since most locally owned media outlets censor content out of concern for sensitive business relations established with mainland China.

### **Significance of the Research Question**

Social media continues to work as an unfiltered tool that has empowered repressed individuals across a large region of the world in a relatively short period of time. Such media have given power and a voice to younger generations so they can counter their repressors, both real and perceived. Even though fearful individuals may not act alone, social media have introduced powerful group dynamics by providing strength in numbers to these movements, which has allowed them to affect legitimate political and regime change. As an enabler of popular resistance movements, social

media share similar traits also found in UW. While the U.S. Army has defined UW doctrine, it contains little in the way of understanding and explaining how social media dovetails with UW. During the January 25 Revolution and 2014 Hong Kong protests, social media played a key role in enabling collective political movements by: organizing actions, raising awareness, establishing communications, gathering intelligence, building influential power, and gaining support through international attention. Highlighting where and how social media influenced these two case studies provides a better understanding of social media's relevance as a tool of UW. This is especially significant since U.S. Special Operations Command (USSOCOM) is currently developing UW joint doctrine.

### **Relevance of the Research Question**

Since social media is a relatively new form of communication and information sharing, it has resonated strongly with younger generations accustomed to its availability and use. Within an educational context, "Digital Natives" describes younger generations growing up during recent digital technology advances, while "Digital Immigrants" describes older generations that adopted aspects of the advances, despite growing up outside of them.<sup>3</sup> While Digital Immigrants can learn to adapt to their environment, they tend to fall back on their socialized ways.<sup>4</sup> Senior political and military leaders that make many of the U.S.'s most important decisions fall into the Digital Immigrant category. Although they adapt to the prevalence of social media, it is a new language, culture, and mindset that is unfamiliar to them and takes extra effort to understand and influence effectively.

Counterterrorism professionals must understand social media's role as a tool or method of UW, and the vulnerabilities and opportunities it offers (for and against regimes). DAIISH has effectively exploited social media to spread propaganda, control beliefs, recruit, preach, broadcast ambitions, and articulate its strategy. Understanding social media in the context of UW might offset DAIISH's reliance on social media,

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3. Marc Prensky, "Digital Natives, Digital Immigrants," *On the Horizon* 9, no. 5 (October 2001): 1-2.

4. Marc Prensky, "Digital Natives, Digital Immigrants," 2.

which appeals to the jihadists it needs to expand its caliphate. This thesis develops a framework for identifying the intersections between social media and UW, the conditions under which social media are most successful, and explores social media's usage in the January 25 Revolution and 2014 Hong Kong protests.

### **Research Statement of Intent/Roadmap**

This thesis explores the existing definitions of social media and UW, seeking to clarify where experts agree and disagree. It also bounds the scope of these two terms, with a focus on social networking and insurgencies within the social media and UW realms, respectively. Furthermore, the research identifies how social media influenced the outcome of recent political movements. Finally, the research highlights social media's effects on UW, and provides evidence for an unrealized theory that social media creates unintended consequences within UW.

### **Research Methodology**

The research methodology for this thesis involves two types of analysis. First, this thesis conducts an analysis of concepts between social media and UW to determine where they overlap and diverge. The analysis references books, periodicals, reports, and U.S. Army doctrine to determine where experts agree and disagree on the definitions of both topics. Second, a comparative case-study analysis of the January 25 Revolution and the 2014 Hong Kong protests, based on primary evidence from first-hand accounts, allow the author to compare and contrast the effectiveness of social media during political activism and resistance campaigns. Analyzing available social networking and video-sharing data from popular websites like Myspace, Facebook, Twitter, and YouTube helps determine social media's proper mode of employment. Also, demographic research helps identify target groups within a population, how to scope communications, what forms of social media are most effective, what causes popularity among these to change, and how often these are likely to change.

### **Limitations of the Study**

Since more time has elapsed since the January 25 Revolution in 2011, relative to the 2014 Hong Kong protests, social media usage data and first-hand reporting for the former is more abundant. Comparisons between the two will likely entail the use of inferential data for the latter movement because of this.



## Chapter 2

### Defining Social Media, Unconventional Warfare, and the Author's Theory

#### **Social Media**

“Media,” as the plural form of the noun “medium,” describes the various forms of communications that exist, while “social” serves as an adjective describing the type of media that pertains to the relationships formed within societies. Therefore, we should view “social media” as a generic label for the various and different forms of technology that individuals and groups within society use to communicate, connect, and form relationships. While there are many different social media categories, the nine most prevalent for this investigation are: social networking (such as MySpace, LinkedIn, Facebook, and Yelp), photo sharing (such as Flickr, ShutterFly, and SnapFish), video sharing (such as YouTube), audio sharing (such as podcasts distributed through iTunes), microblogging (such as Twitter), productivity applications (such as Gmail), mobile technology (such as the Apple iPhone and Google Android,) and interpersonal applications (such as Skype or iChat).<sup>1</sup>

Social networking differs from previous forms of media, whether written communication, radio, or television, by disseminating two-way communication at unmatched speeds. This non-traditional interaction allows social networking users to engage and influence one another in methods that one-way communications have not, by seeking participation and allowing users to voice their opinions and form connections. These connections, made through shared experiences, eventually result in the creation of virtual communities and the establishment of trust. Unlike physical channels, virtual communication channels are more easily linked, resulting in an increase in the formation of new connections.

Besides rapid, two-way written communication over social networking applications, advancements in digital photography have made photo editing and sharing a low-cost, supplementary form of expression. Given that “a picture is worth a thousand

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1. For an extensive visual map of the social media landscape, organized by usage, see Brian Solis, “The Conversation Prism,” <http://www.conversationprism.com//> (accessed 20 May 2015).

words,” photo sharing via social media has aided visualization. Video files add an even further level of expression, transmitting messages that include more visual information and context, such as body language. YouTube is an example of a popular video sharing web site that not only allows audiences to search for and upload educational and entertainment video files, but also encourages participation, allowing audiences to submit feedback within its comment sections.

While audio, video and animation sharing is possible, audio is the simplest form of communication to package and consume. Podcasting easily creates and shares user-generated content with worldwide audiences for free. Computer access is the only requirement for users and audiences to enjoy podcasts, and audio and video sharing programs such as iTunes have made searching for, downloading, playing, and organizing audio and video files simple. Portable players allow busy audience members to enjoy speeches, sermons, education or training seminars, and interviews during their free time.

Although audio files are easily created, shared, and consumed, microblog providers allow users to communicate concise messages very rapidly. Although Twitter allows for rapid communications, the collected volume of messages during crises has led to server overloads and service outages. Privacy concerns have also plagued the provider since Twitter’s servers store client information for marketing purposes.

Proliferation of mobile communication technology allows social networking exploitation to occur in a real-time manner. Users are no longer constrained to fixed Internet access locations and do not have to return to their stationary computers to share their experiences. Instead, they can send their opinions and reactions to events as they play out. Mobile communication devices have also incorporated the use of location-based services (LBSs), geo-tagging, and tracking. LBSs use a mobile device’s location to ease mobile application interactions, while geo-tagging embeds location information within the meta-data, or underlying data that accompanies media files. Some applications even use mobile devices and wireless signals to track a user’s location through constant position updates. While these three examples add a level of usability to applications, they also create privacy and security concerns for mobile device users. Finally, mobile user-

generated content also takes on a higher level of trustworthiness, as users are able to provide image or video proof of their surroundings with their comments.

Interpersonal applications, such as Skype, FaceTime, and iChat, eliminate travel time and cost by providing virtual conferencing and training opportunities. While many of these interpersonal applications are extremely accessible, they tend to operate on a peer-to-peer (P2P) networking architecture, which is also less secure than its client-server counterpart.

The differences in social media networking architectures boil down to relative levels of centralization, access, and security. Compared to client-server networking architectures, P2P network architectures are more distributed, and because they are almost totally accessible, they offer almost no security. Client-server networks are just the opposite, employing a more centralized, controlled, and secure architecture. Instead of using a central server to route communications, P2P networks form a randomly connected structure among peer nodes that act as client and server. This decentralized architecture avoids the problems commonly associated with a single point of failure, while distributing content control to the peer nodes. In a P2P network, each node also devotes some of its resources to the overall network. This produces a scalable network capacity that expands or collapses as clients join or leave the network, respectively. While this P2P architecture is inexpensive and easy to set up, it does have its security vulnerabilities. Because of its openness, P2P networks are more prone to denial-of-service attacks and exposure to malware originating from its clients. Most social networking programs utilize a more centralized level of control in their client-server networking architecture, while interpersonal applications tend to use a P2P framework.

Despite social media's many categories, they introduce redundancy to the realm of rapid information sharing. Building networks of networks, social media's users connect by finding shared experiences among a global audience. Thanks to social media's low cost of entry, global reach, and speed of dissemination, people from all classes can quickly project their voice worldwide. Instead of one-way broadcasting, social media comprises a variety of powerful, multimedia tools offering compelling, two-way, interactive communications that allow human beings to exploit networks.



## Unconventional Warfare

It is somewhat paradoxical that clearly defining UW, a concept that has been around for more than 60 years, is more difficult than defining social media. There are several reasons for this difficulty. First, even though Joint Publication 3-05 provides joint doctrine on the topic of special operations, no Department of Defense (DoD) or joint-level doctrine specifically exists for UW. However, there are Army field manuals, training circulars, and doctrine publications that provide inputs on how Army special operations forces (SOF) and SF should conduct UW. These manuals and other sources help define and scope UW in this chapter. Second, understanding UW is difficult due to its terminology. UW has taken the form of many names, its definition has been revised many times over the years, and terminology has caused confusion. Terms such as “conventional” and “unconventional,” “regular” and “irregular,” “symmetric” or “asymmetric,” or “traditional” and “nontraditional,” seem specific to a particular historical period. The most recent manifestation, in part a reflection of Russian activities in Crimea and the Ukraine, is between “conventional” and “hybrid” war. Although recent U.S. history has involved a more direct application of violence against clearly defined military forces, this past behavior is not likely indicative of what the future holds. Future threats, and their ability to rapidly adapt to U.S. conduct in war, might require a change in U.S. wartime employment. Coercion, disruption, subversion, and intimidation operations among elusive forces for political goals have occurred less frequently, but if combating these indirect threats became the new “norm,” which form is now the “conventional” form of warfare and which is “unconventional?”<sup>2</sup>

In order to understand the overlap between UW and social media, it is important to identify two of the former’s key components: *why* conduct UW and by *whom*. The

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2. An example of this debate, specifically regarding UW, has played out on a number of national security blogs. Two of the most important articles in this debate are David S. Maxwell, “Unconventional Warfare Does Not Belong to Special Forces,” *War on the Rocks.com*, 12 August 2013, <http://warontherocks.com/2013/08/unconventional-warfare-does-not-belong-to-special-forces/> (accessed 7 April 2015), and David S. Maxwell, “Do We Really Understand Unconventional Warfare,” *Small Wars Journal.com*, 23 October 2014, <http://smallwarsjournal.com/jrnl/art/do-we-really-understand-unconventional-warfare> (accessed 7 April 2015).



U.S. DoD defines UW as “activities conducted to enable a resistance movement or insurgency to coerce, disrupt, or overthrow a government or occupying power by operating through or with an underground, auxiliary, and guerrilla force in a denied area.”<sup>3</sup> The U.S. Department of the Army further defines “The goal of unconventional warfare operations is to coerce or disrupt a nation or cause a change in political control and/or perceived regime legitimacy.”<sup>4</sup> In its purest sense, UW efforts are destabilizing and degrade legitimacy in order to change the status quo unilaterally, or with help from an external actor. The struggle for legitimacy and credibility is paramount within UW operations, because the support of indigenous and U.S. populations, as well as the international community, is lost without it.<sup>5</sup>

The composition of, and organization for, a typical UW operation reveals the division of responsibilities and how interactions take place, which will be compared to the two case studies involving social media. The U.S. Army prescribes there are three components of a resistance or insurgency: guerrillas, the underground, and the auxiliary. While guerrillas are irregular, indigenous personnel that carry out most of the armed conflict, the underground is made up of indigenous persons or foreigners that conduct subversion, sabotage, and intelligence collection operations within areas inaccessible to guerrillas, and the auxiliary acts clandestinely as the support element that enables guerrillas and the underground.<sup>6</sup> Thinking of these three components as different types of people within an organization instead of different types of units is helpful. Also, two organizational considerations affecting UW are worth highlighting: the area command and the mass base. Comprised of leadership cells of the three previously discussed components, the area command also includes SOF members to provide operational and strategic guidance.<sup>7</sup> Likening the mass base to the well from which the movement draws its water, it constitutes the indigenous population used to form irregular cadres, increases moral and physical support, and counters adversary propaganda, all of which play a

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3. Joint Publication (JP) 3-05, *Special Operations*, 16 July 2014, GL-12.

4. Field Manual (FM) 3-05, *Army Special Operations*, 6 January 2014, 2-2.

5. Field Manual (FM) 3-05.130, *Army Special Operations Forces Unconventional Warfare*, 30 September 2008, 4-3.

6. Field Manual (FM) 3-05, *Army Special Operations*, 2-3.

7. Field Manual (FM) 3-05, *Army Special Operations*, 2-3.

critical role in UW operations.<sup>8</sup> Finally, UW operations require these two organizations interact through centralized command and decentralized execution, with feedback given to the area command so leadership can leverage strengths and mitigate weaknesses.<sup>9</sup>

While each application of UW is unique, there are seven distinct phases of a U.S.-sponsored UW campaign. These phases may or may not occur sequentially, and can also occur simultaneously.<sup>10</sup> Before beginning the first phase, though, U.S. SF and other members of the country team spend significant time preparing the environment in the “shaping” phase, commonly known as “phase zero.”<sup>11</sup> The first phase, termed “preparation,” is heavily reliant on information operations and interagency efforts, and ensures all actors are ready to conduct a UW campaign, allowing for operation cancellation if not.<sup>12</sup> The second phase, known as “initial contact,” utilizes a pilot team to expand its understanding of the operational environment and assess UW capability.<sup>13</sup> The third phase of “infiltration” includes SOF connection with the pilot team and/or irregular forces by any given number of methods, driven by mission requirements.<sup>14</sup> Within the fourth phase, “organization,” U.S. advisors and resistance leadership build trust, organize an infrastructure, discuss expectations, and confirm objectives.<sup>15</sup> The fifth phase of the campaign, “buildup,” continues through the sixth phase, where lethal and nonlethal “employment” events take place.<sup>16</sup> Dependent on goals of the UW campaign and how planners envision it ending, the seventh phase, “transition,” could involve promoting a new government’s legitimacy and transitioning to foreign internal defense, or withdrawal of U.S. forces after fulfilling more limited objectives.<sup>17</sup>

Since UW practitioners focus activities on mobilizing a population, understanding how and why populations resist is important when evaluating resistance effectiveness and

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8. Field Manual (FM) 3-05, *Army Special Operations*, 2-3, 2-4.

9. Field Manual (FM) 3-05, *Army Special Operations*, 2-4.

10. Field Manual (FM) 3-05, *Army Special Operations*, 2-2.

11. Field Manual (FM) 3-05, *Army Special Operations*, 2-2.

12. Field Manual (FM) 3-05, *Army Special Operations*, 2-2.

13. Field Manual (FM) 3-05, *Army Special Operations*, 2-2.

14. Field Manual (FM) 3-05, *Army Special Operations*, 2-3.

15. Field Manual (FM) 3-05, *Army Special Operations*, 2-3.

16. Field Manual (FM) 3-05, *Army Special Operations*, 2-4.

17. Field Manual (FM) 3-05, *Army Special Operations*, 2-4.

causes within the context of social media's impact on the two case studies. Resistance typically begins on an individual level, where opposition against the governing authority exists, but nonviolent and violent actions against it remain unorganized and sporadic.<sup>18</sup> Over time, feelings of opposition spread throughout the individual's social network, channeling discontent into more organized resistance, which encourages further growth.<sup>19</sup> In order for this growing discontent to take the form of insurrection, three things must occur. First, a significant portion of the population must perceive they have nothing to lose by revolting, and they must believe success is possible.<sup>20</sup> Second, some sort of triggering event must change the tide and sway popular support to the resistance and against governing authority.<sup>21</sup> Finally, an insurgent leadership must exist to guide resistance efforts and exploit the situation.<sup>22</sup>

The strong political involvement and mobilization necessary in UW further defines its nature and the conditions that are favorable for action. The political risk involved in UW is higher than other activities because UW challenges a sovereign state's, or regime's, political legitimacy. UW operations tend to exhibit covert and/or clandestine characteristics since challenges to the existing social and/or political order often come from external actors. A covert operation is "an operation that is so planned and executed as to conceal the identity of or permit plausible denial by the sponsor," whereas a clandestine operation is "an operation sponsored or conducted by governmental departments or agencies in such a way to assure secrecy or concealment."<sup>23</sup> The initial focus of UW activities supporting a resistance or insurgency also concentrates on areas where the governing authority is able to deny the opposition's freedom of action.<sup>24</sup> Because UW operations are often diplomatically and/or politically sensitive, they require a whole-of-government approach and high degree of coordination, deconfliction, and

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18. Training Circular (TC) 18-01, *Special Forces Unconventional Warfare*, 28 January 2011, 2-1.

19. Training Circular (TC) 18-01, *Special Forces Unconventional Warfare*, 2-1.

20. Training Circular (TC) 18-01, *Special Forces Unconventional Warfare*, 2-1.

21. Training Circular (TC) 18-01, *Special Forces Unconventional Warfare*, 2-1.

22. Training Circular (TC) 18-01, *Special Forces Unconventional Warfare*, 2-1.

23. Joint Publication (JP) 3-05, *Special Operations*, GL-6-GL-7.

24. Joint Publication (JP) 3-05, *Special Operations*, II-8.

integration.<sup>25</sup> Some of the conditions that make UW operations favorable include: vulnerability of the governing authority's legitimacy, an inability to control the population, and an operational environment that is suitable for UW.<sup>26</sup>

UW also places great importance on: the factors of relationships within and between social networks, trust, and a keen understanding of the environment surrounding the actors being influenced. These factors are important as UW involves influencing a change to occur from within, rather than the external application of brute force commonly associated with conventional warfare. Besides requiring a willingness to accept greater levels of risk and the tendency for complex problems to develop from running numerous clandestine and covert activities over time, UW operations typically take time to prepare for, develop, and execute. Historically, U.S. policy makers and public support have favored quick and decisive victories though, and while UW operations come with significant risks, payoffs include: limiting conflict escalation, and avoiding regime change through large-scale conventional force employment, as occurred in Grenada (1983), Panama (1989), and Iraq (2003).<sup>27</sup>

### **The Author's Theory**

Defining social media and UW helps discover where these two phenomena intersect and diverge, and in term, help illuminate the role social media can potentially play in UW. Social media have provided a unique way for individuals to communicate, connect, and form relationships in the vast and borderless cyberspace environment. Like UW, social media influence others, are reliant upon relationships and networks, and are population-centric. Therefore, it seems social media and UW both have intrinsically irregular characteristics, but this is not wholly obvious because the DoD tends to define responsibility and authority roles based upon scope of effects instead of character of warfare. Encompassing social media, cyberspace responsibility and authority resides under U.S. Strategic Command (USSTRATCOM), even though some have argued for

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25. Joint Publication (JP) 3-05, *Special Operations*, II-9.

26. Joint Publication (JP) 3-05, *Special Operations*, II-10.

27. Joint Publication (JP) 3-05, *Special Operations*, II-8.

placing it under USSOCOM, because of its similar character of warfare.<sup>28</sup> Realizing this shared irregular warfare (IW) characterization between social media and UW leads to the discovery of common intersections.

The first intersection between social media and UW resides in a model where groups encounter a tradeoff between security and control when operating in an uncertain environment.<sup>29</sup> This security-control tradeoff model expresses that security and control directly oppose one another. While more highly structured organizational frameworks are easier to control, they also collapse more easily when penetrated by the enemy, and vice versa.<sup>30</sup> Centralized leadership may result in efficient command and control, but it also opens up the movement to security vulnerabilities, such as decapitation. Decentralized control rids the organization of targetable leadership, but also makes it more difficult for states to suppress movements. Decentralized control may also lead to a divergence of opinion on the best course of action to take when authority is spread thin, in other words, compromising unity of effort within and across the organization. Knowing this, UW operations tend to involve a centralized level of control from its area command, and decentralized execution from the mass base. SOF tend to avoid some of these concerns though by utilizing mission orders from the military commander to subordinate leaders. These orders provide clear intent and guidance regarding mission goals, but give subordinate leaders the flexibility at the operational and tactical levels of command to execute the orders independently. Since UW operations are typically covert and/or clandestine in nature, security fears typically limit control via communications. While transparency supposedly enforces social media control, actions within social networking applications prove otherwise. For instance, although many saw Facebook as an upgrade to MySpace because of its user verification process, users exploited these

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28. Jason Healey and Carl Grindal (eds), *A Fierce Domain: Conflict in Cyberspace, 1986 to 2012* (Washington, D.C.: Atlantic Council, 2014), 47.

29. Jacob N. Shapiro, *The Terrorist's Dilemma: Managing Violent Covert Organizations* (Princeton, NJ: Princeton University Press, 2013), 103.

30. J. K. Zawodny, "Guerrilla and Sabotage: Organization, Operations, Motivations, Escalation," in *The Annals of the American Academy of Political and Social Science: Unconventional Warfare*, ed. Thorsten Sellin and Richard D. Lambert (Princeton, NJ: Princeton University Press, May 1962), 9.

procedures, creating multiple accounts under different aliases. Therefore, like UW, security-control tradeoffs also affect social media, with the driver for most of these concerns coming mainly from the organization's networking architecture.

Social media harmonize well with UW by acting as a mobilizing structure, or a vehicle through which people engage in collective action.<sup>31</sup> Social media as a mobilizing structure functions to recruit, train, generate resources, command and control, connect, and coordinate UW operations. Social media are unique because they provide a relatively free means of expression for their users. This is important, because in most repressed states, the authoritarian power accustoms the population to being talked *at* from a vertical, one-way construct.<sup>32</sup> Instead, social media flatten out the communication structure, offering users a chance to talk *to* or speak *with* others in a two-way democratic communication format that is more receptive due to its horizontal structure.<sup>33</sup> Social media also enable its users to leverage existing social infrastructure, which enhances legitimacy, offers a more institutionalized form of mobilization, and allows for more favorable long-term geopolitical consequences.<sup>34</sup>

Social media and UW also share similarities in their reliance on networks and formation of relationships, which is empowering for individuals and allows them to take action collectively. Begun as a social experiment to encourage spontaneity, flash mobs have become a common example of this, where social media have been used to organize an assembly of people for any number of purposes, who then quickly disperse after a period of time. Social media's low cost of entry, global reach, and speed of information dissemination provide the structure for strength and safety in numbers to take hold and create a momentum force within UW operations. Within the individual context, security

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31. Doug McAdam, John McCarthy, and Mayer Zald (eds), *Comparative Perspectives on Social Movements* (New York, NY: Cambridge University Press, 1996), 3.

32. Rasha A. Abdulla, "The Revolution Will Be Tweeted: The Story of Digital Activism in Egypt," *The Cairo Review of Global Affairs*, (March 2011): 45, [www.aucegypt.edu/gapp/cairoreview/pages/articledetails.aspx?aid=89](http://www.aucegypt.edu/gapp/cairoreview/pages/articledetails.aspx?aid=89) (accessed 1 April 2015).

33. Rasha A. Abdulla, "Revolution Will Be Tweeted," 45.

34. Doowan Lee, "A Social Movement Approach to Unconventional Warfare," *Special Warfare* 26, no. 3 (July-September 2013): 29.



and safety concerns typically suppress any desire to resist the ruling regime. As social media allow a network of networks to form, users realize they are part of a larger movement, which mitigates risk among the group and allows individuals with shared interests to act out according to their collective beliefs. Whether formed on a virtual network or a real one, both social media and UW rely on relationships to empower individuals to act.

As an open system, social media also serve to further propaganda and spread misinformation, another key characteristic in shaping opinions during UW operations. Since social media lack any formal fact-checking mechanisms and its publishing tools are free, information distribution is unfiltered and nearly instantaneous. While armed forces strive to provide timely and accurate information to the public, social media significantly shorten this distribution timeline and make controlling media access extremely difficult, if not impossible. Because a wide range of developments can cause change to occur, and forecasting the future state is extremely difficult within the UW environment, it is one that is heavily dependent upon reliable and continuous information updates. Denying information to the adversary becomes a complex problem when any one of many mobile device owners can capture an event, put their propaganda spin on it, and distribute it worldwide almost as quickly as it occurs. Social media propaganda is likened to the guerrilla who forces the state to protect and defend everywhere by spreading out resources and effort to increase chances of defeat. Because information carries so much influential power within UW operations, Army SF view UW as the art of recognizing the various avenues of information present, navigating its contours, and leveraging cultural awareness.<sup>35</sup> To appropriately leverage cultural awareness, UW practitioners must determine which forms of social media are most effectively utilized within different societies, for example text and cell messages in Afghanistan. Luckily, a world map of social networks exists, which identifies popular social network trends by portraying

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35. Field Manual (FM) 3-05.130, *Army Special Operations Forces Unconventional Warfare*, 2-3.

compiled social media traffic data every six months onto a world map separated by country.<sup>36</sup>

Legal issues are another area of overlap between social media and UW. While determining how to lawfully counter UW threats has proven difficult in the past because of combatant status classification issues, foreign governments have also struggled with countering negative information or misinformation across social media services. For example, the lawful combatant status of UW guerrillas in an *international* conflict is dependent upon four conditions: the presence of a commander responsible for ensuring guerrilla subordinates follow the laws of war, wearing of a distinctive sign to delineate lawful targets from noncombatant civilians, open carry of arms as another distinguisher, and conduct in accordance with the laws and customs of war.<sup>37</sup> Russia's employment of armed irregular forces, and subsequent disavowal of involvement, within Ukraine during the 2014 Crimean crisis posed a serious dilemma for Ukrainian and American responders. In *internal* conflict, however, guerrillas have limited legal combatant privileges and their government can try and execute them for rebellion, treason, or subversion.<sup>38</sup> Within the social media realm, private and public companies tend to provide services that create challenges for states trying to exert communications control. Oftentimes a state blocks or bans a social media website striving to preserve user rights, protect user access, and uphold free speech guarantees. Many blocking and banning attempts also end up with alternate routes being identified and opened as a short-term workaround.

Whether justified for advertising purposes or to enhance user experience, privacy issues have also evolved from social media services. With the advent of global positioning system (GPS) smart phones, location-based social networking sites utilize

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36. Updated every June and December, the Italian-based blog pulls data from Alexa and Google Trends and is available at "World Map of Social Networks," *Vincos Blog*, <http://vincos.it/world-map-of-social-networks/> (accessed 22 May 2015).

37. International Committee of the Red Cross (ICRC), *Geneva Convention Relative to the Treatment of Prisoners of War (Third Geneva Convention)*, 12 August 1949, 75 UNTS 135, available at: <http://www.refworld.org/docid/3ae6b36c8.html> (accessed 1 April 2015).

38. International Committee of the Red Cross (ICRC), *Geneva Convention Relative to the Treatment of Prisoners of War (Third Geneva Convention)*.



geo-tagging.<sup>39</sup> While location-aware networks may make applications easier to use, they also share user locations with the public, whether or not the users intend to or realize it. Facebook also maintains a history of its member's activities, and even though users may prohibit third-party applications from collecting on usage trends, it still occurs as long as someone within a user's virtual network allows it. These privacy concerns make the planning, coordination, and conduct of covert and clandestine UW operations more difficult, but social media users tend to find ways to adapt. For example, a study recently revealed there are up to 90,000 Twitter accounts supporting DAIISH, with many supporters communicating from multiple accounts to curb the effects of account suspension on their propaganda efforts.<sup>40</sup>

Another intersection between social media and UW exists in the importance both place on social recognition. Both value and recognize reliability, trust, and loyalty within their respective community. Social media expresses these values in many different ways, such as the audience one commands via a "follower" count, or how many "likes" or "friends" one has accumulated. A service called Klout even exists that determines "virtual" authority by tracking the influence an individual has within a social network. Also, services like LinkedIn give its users a comprehensive look into the professional background of other members, giving insight into their business experiences, and the connections they have made. LinkedIn also employs an informal "vetting" process that allows users to accept or decline invitations based on proximity and number of contacts. Whereas people are often unlikely to trust a stranger in reality, there is less hesitation online because extensive contact lists create "friend of a friend" scenarios.

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39. Geo-tagging involves the addition of geographical information to media through the use of underlying metadata. A common example of geo-tagging occurs when a GPS-enabled camera attaches geographic coordinates to a photo. For more information, see Cory Janssen, "Geotagging," *Technopedia*,

<http://www.techopedia.com/definition/86/geotagging> (accessed 20 May 2015).

40. Heather Saul, "ISIS Propaganda: Study Finds Up To 90,000 Twitter Accounts Supporting Extremist Group," *The Independent*, 6 March 2015, <http://www.independent.co.uk/life-style/gadgets-and-tech/isis-propaganda-study-finds-up-to-90000-twitter-accounts-supporting-extremist-group-10090309.html> (accessed 19 May 2015).

Finally, while language differences often challenge successful UW operations, social media's use of computer-based translation bots work to remove these barriers. For example, Google Translate acts like many foreign language interpreters, allowing multilingual group chat conversations to occur within Gmail. While this capability does not necessarily provide cultural knowledge to social media users, it does overcome some language hurdles. This capability is often limited to literal translation though, and does not usually account for native idiomatic expressions a SF soldier might learn during their qualification course.

Because of its near-real-time dissemination of information across the globe, social media alters the mass perception there is nothing to lose, success is possible, a catalyzing event exists to ignite popular support, and leadership exists to exploit opportunities. Social media provide a means by which the guerrilla, auxiliary, and underground can function more efficiently in intelligence collection, recruiting and training, communications, and propaganda distribution. I will now use the framework of social media and UW intersections involving security-control tradeoffs, mobilizing structures promoting collective action, network formation leading to empowerment, propaganda shaping public opinion, legal challenges, privacy issues, social recognition, and language translation to examine the Arab Spring's January 25 Revolution and the 2014 Hong Kong protests. The following two chapters will highlight these intersections between social media and UW through specific examples from each of the two case studies.

## Chapter 3

### January 25 Revolution Case Study

Receiving extensive media attention since 2010, the Arab Spring has encompassed many demonstrations, protests, and revolutionary actions throughout the Arab world. While many North African and Persian Gulf countries have experienced drastic changes in the status quo, arguably none have been as noteworthy as the events continuing to play out in Egypt. After resigning his presidency in 2011, an Egyptian court sentenced Hosni Mubarak to life in prison for failure to stop the killings during the Egyptian Revolution of 2011, known locally as the January 25 Revolution.<sup>1</sup> In 2013, a coup d'état deposed Egyptian President Mohamed Morsi, and violence continues to disrupt Egyptian life today. Because social media profoundly enabled wholesale changes to Egypt's entrenched ruling government during earlier parts of the Arab Spring, the January 25 Revolution will be the first case study evaluated for intersections and divergences between social media and UW.

#### **The Arab Spring...What Started It?**

Although known by many names, such as "The Arab Spring," "Arab Awakening," "Arab Uprisings," and "Great Arab Revolt," the demonstrations, protests, and revolutionary actions across the Arab world began on December 17, 2010 in Tunisia. The catalytic event involved Muhammad Bouazizi, a street vendor who lit himself on fire in protest of continual harassment and public humiliation by municipal officials. While Bouazizi was not the first protester to practice self-immolation, his action quickly gathered attention because of where he conducted it.<sup>2</sup> Previous sacrificial acts of

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1. Although known by many names, including the Egyptian Revolution of 2011, 25 January Revolution, Freedom Revolution, Rage Revolution, Youth Revolution, Lotus Revolution, and White Revolution, this thesis will utilize the January 25 Revolution nomenclature, since this was the locally predominate name.

2. The best-known case of self-immolation occurred in South Vietnam in 1963 when Buddhist monk Thich Quang Duc set himself on fire at a busy street intersection in Saigon. Photographs and footage of the event spread around the world and, according to some authors, contributed to the downfall of South Vietnamese President Ngo Dinh

resistance were typically carried out in urban environments, where individual actors were mostly alienated from the surrounding community. Bouazizi conducted his act in the small, rural town of Sidi Bouzid, leveraging his powerful familial and communal ties to incite action against a corrupt regime.<sup>3</sup> Uprisings against authoritarian rule in various countries in Northern Africa spread throughout the region, but not necessarily due to an attraction to democracy. Instead, shared feelings of “relative deprivation” flourished among the protesters, as different forms of social media enabled the common people of “the Arab Street” to see the open and free lifestyles others were living.<sup>4</sup> Although social media was not the cause of the Arab Spring, it highlighted political inequalities and fostered the realization, among a mass population base, that better conditions existed elsewhere in the world. The combination of social media spreading awareness fueled the collective will of the population to resist.

### **Where Else Did It Occur?**

After Bouazizi’s self-immolation in Tunisia, resistance movements sprung up spontaneously and expanded throughout the Arab world, including Egypt, Bahrain, Yemen, Libya, and Syria. As these movements gained both mass and momentum, a number were successful in implementing change in their respective countries. Although Tunisia’s president extended his sympathies by visiting a dying Bouazizi in the hospital, Zine El Abidine Ben Ali was the first leader to succumb to the mass protest against his regime.<sup>5</sup> After he and his family fled to Saudi Arabia, democratic elections and a new

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Diem. For details see Spencer Tucker, *Vietnam* (Lexington, KY: University of Kentucky Press, 1999), 99-100.

3. Paul McCaffrey, “Why Tunisia? Muhammad Bouazizi and the Birth of the Arab Spring,” in *The Reference Shelf: The Arab Spring*, ed. Paul McCaffrey (Ipswich, MA: H. W. Wilson, 2012), 44.

4. Ghada Hashem Talhami, “Preface: The Arab Revolution,” in *The Reference Shelf: The Arab Spring*, ed. Paul McCaffrey (Ipswich, MA: H. W. Wilson, 2012), xi. The term “relative deprivation” was coined by Ted Robert Gurr in his landmark 1970 study Gurr, *Why Men Rebel* (Princeton, NJ: Princeton University Press, 1970), 24.

5. The famous image of Tunisian President Ben Ali visiting Bouazizi in the hospital just seven days before Bouazizi’s death and 17 days before Ben Ali fled the country is available at “Mohamed Bouazizi, The Fruit Vendor Whose Death May Have Changed the Arab World,” *NBC News*, 28 January 2011,

government followed. Many outside observers attribute the civility of the Tunisian uprisings to its largely homogenous population, which limited opportunities for sectarian divides during internal conflict.<sup>6</sup> Not all uprisings were as civil as the one in Tunisia. While the overthrow of Egyptian President Hosni Mubarak was relatively non-violent, Egypt faced numerous challenges in its transition to democracy. In addition, Libyan leader Muammar Qaddafi's oil wealth allowed him to fund a long and bloody civil war against various resistance groups.<sup>7</sup>

### **What Specifically Happened in Egypt?**

Social media has played an increasingly important role in IW since 2008, and has acted as a primary change agent for a historically stagnant political atmosphere in modern Egypt. This study of social media's intersections with UW begins with the January 25 Revolution. Although social media first brought relative deprivation awareness to the various Arab populations during the Tunisian protests, awareness did not necessarily translate to power or influence. Several leaders and observers ascribed pervasiveness and influence to social media when they better understood the role it played in the January 25 Revolution.

Understanding social media's significance during the January 25 Revolution requires consideration of the context; in particular, Egypt's political history over the last 60 years. The modern political history of Egypt begins with the Egyptian Revolution of 1952. This event, which was a coup conducted by military officers, saw the overthrow of Egypt's constitutional monarchy and declaration of Egypt as a republic. One year later, the Egyptian Revolutionary Command Council appointed its chairman, and the leader of the Free Officers movement that conducted the coup, General Muhammad Naguib, as Egypt's prime minister and the country's first president.

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[http://photoblog.nbcnews.com/\\_news/2011/01/28/5941280-mohamed-bouazizi-the-fruit-vendor-whose-death-may-have-changed-the-arab-world](http://photoblog.nbcnews.com/_news/2011/01/28/5941280-mohamed-bouazizi-the-fruit-vendor-whose-death-may-have-changed-the-arab-world) (accessed 20 May 2015).

6. Paul McCaffrey, "Why Tunisia? Muhammad Bouazizi and the Birth of the Arab Spring," 42.

7. Paul McCaffrey, "Why Tunisia?," 42.

Almost immediately after Naguib's appointment, the transnational Islamist organization known as the Muslim Brotherhood formed street protests. Founded as a religious social organization in Egypt in 1928, the Muslim Brotherhood began taking on the characteristics of a political party as it gained influence.<sup>8</sup> The Muslim Brotherhood opposed the newly created Constitution approved by Naguib, primarily because of its secularist tone and principles. Historians largely characterize Egypt's politically violent past as involving the Muslim Brotherhood for governance based on religious principles, and leaders seeking to maintain secular regimes.<sup>9</sup> The suppression of the Muslim Brotherhood continued from 1954 until the January 25 Revolution, with Muslim Brotherhood leaders and its supporters arguing for non-violent means to influence government. Opponents of the Brotherhood, however, accused the organization and its leadership of being responsible for political violence including assassination attempts.

Naguib's tenure as leader of Egypt was short. After serving a year in office, his Deputy Prime Minister, Gamal Abdel Nasser, accused Naguib of supporting the newly outlawed Muslim Brotherhood. The charges led Naguib to resign, with Nasser assuming political leadership and continuing to serve as president until his death in 1970. After Nasser's death, Anwar Sadat became president until his assassination by Muslim Brotherhood members in 1981.<sup>10</sup> Nominated by a majority of the People's Assembly, and approved under a referendum process, Sadat's Vice President, Hosni Mubarak, became president after the assassination. Mubarak held the presidency for nearly 30 years, until his resignation during the January 25 Revolution. While corruption and repression plagued Mubarak's five terms as president, his predecessors established state control over the people well before his election in 1981. The Emergency Law, enacted by Nasser in 1958 and extended by various presidents through 2012, permitted indefinite

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8. Johannes Jansen, *The Dual Nature of Islamic Fundamentalism* (Ithaca, NY: Cornell University Press, 1997), 44-49.

9. An accessible summary of underlying social, economic, and political tensions in Egypt is contained in Adnan Musallam, *From Secularism to Jihad: Sayyid Qutb and the Foundations of Radical Islam* (Westport, CT: Praeger, 2005), 1-25.

10. The Brotherhood's role in Sadat's assassination, and in particular its theological justification for the action, is contained in Johannes Jansen, *The Neglected Duty: The Creed of Sadat's Assassins and Islamic Resurgence in the Middle East* (New York: Macmillan, 1986), 1-31.



detention without trial and military court hearings of civilians, while prohibiting gatherings of more than five people and limiting speech freedoms.<sup>11</sup>

### **The January 25 Revolution**

The preceding brief survey of Egypt's political history makes it easier to understand the impact of social media during the January 25 Revolution. Bouazizi's self-immolation was the catalyst for protest in Tunisia. In Egypt, Khaled Mohamed Said's brutal death, and the aftermath that ensued, was the primary catalyst for widespread protest in Egypt. Said, a 28-year-old Egyptian, became the center of nationwide protest after an incident in 2010. While sitting in a cybercafé, state security forces arrested Said and then viciously and publicly beat him to death while removing him from the establishment. Those who witnessed it condemned the act roundly. Protesters subsequently posted information about Said's death on the Internet, and awareness of the incident spread like a contagion. Khaled's brother released graphic, post-mortem pictures of his battered face on the Internet, which led to massive protests against the Mubarak regime, and its dreaded security service, the State Security Investigation Service (SSI), in Cairo's Tahrir Square.<sup>12</sup> The size of the protest movement was impressive, estimated at close to 200,000 individuals at its peak.<sup>13</sup>

As the protest grew in size, Wael Ghonim blogged an additional call to protest, which helped focus the public sentiment of the January 25 Revolution on government abuses, such as police brutality, and attempts made to cover up such acts.<sup>14</sup> Ghonim, a

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11. Daniel Williams, "Egypt Extends 25-Year-Old Emergency Law," *The Washington Post*, 1 May 2006, <http://www.washingtonpost.com/wp-dyn/content/article/2006/04/30/AR2006043001039.html> (accessed 19 April 2015).

12. You can view the graphic, post-mortem pictures that incited protests at "For Khalid, For His Family and For Egypt 'Graphic'," *Egyptian Chronicles*, 10 June 2010, <http://egyptianchronicles.blogspot.com/2010/06/for-khalid-for-his-family-and-for-egypt.html> (accessed 20 May 2015).

13. "Gauging the Size of the Egyptian Protests," *Stratfor.com*, 31 January 2011, <https://www.stratfor.com/analysis/gauging-size-egyptian-protests> (accessed 28 April 2015).

14. Jennifer Preston, "Movement Began With Outrage and a Facebook Page That Gave It an Outlet," *The New York Times*, 5 February 2011,

30-year-old executive with Google, focused and channeled resistance and outrage by anonymously starting a Facebook group, entitled “We are all Khaled Said,” to protest his death. Upon his return to his native Egypt, police eventually arrested and detained Ghonim, then released him after 12 days of interrogation. Egyptian TV channel Dream Two then interviewed Ghonim after his release, televising his words nationally and broadcasting them online.<sup>15</sup> His interview was so powerful, and its impact on the protest movement so profound, Mubarak resigned from his 30-year presidency only four days later.

Whether or not he realized it at the time, Ghonim’s actions and subsequent Internet usage helped fulfill three of UW’s tenets prescribing why populations resist. First, he helped a significant portion of the population perceive they had nothing to lose by rebelling, and success was possible. When asked by family and friends what the alternatives were to Mubarak’s oppressive rule, Ghonim responded with “Any alternative would be better than this regime.”<sup>16</sup> At first, most people were not convinced by his words, but over time, he swayed activists via the Internet. The success Tunisian protesters had in ousting President Ben Ali provided the Egyptian protesters with hope their collective action could be successful. Second, Ghonim recognized and took advantage of a catalytic event, the death of Said, swaying popular support to resisting Mubarak’s governing authority. Third, he acted as an insurgent leader by guiding resistance efforts and exploiting the situations that developed. This is evident as early as 2008, when an interviewer for a regional head of marketing position in Cairo asked Ghonim why he wanted to join Google, and he stated, “I want to be actively engaged in changing our region. I believe that the Internet is going to help make that happen, and

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<http://www.nytimes.com/2011/02/06/world/middleeast/06face.html> (accessed 19 April 2015).

15. Amy Goodman and Juan Gonzalez, “The Heroes are the Ones in the Street: Google Exec and Facebook Activist Wael Ghonim on His Release After 12 Days in Egyptian Jail,” *Democracy Now.org*, 8 February 2011, [http://www.democracynow.org/2011/2/8/the\\_heroes\\_are\\_the\\_ones\\_in](http://www.democracynow.org/2011/2/8/the_heroes_are_the_ones_in) (accessed 28 April 2015).

16. Wael Ghonim, *Revolution 2.0: The Power of the People is Greater Than the People in Power: A Memoir* (Boston, MA: Houghton Mifflin Harcourt, 2012), 38.



working for Google is the best way for me to have a role.”<sup>17</sup> Then, less than 24 hours after his release and following his inspirational interview, more than 170,000 people nominated him as “the speaker for the Egyptian revolution” on Facebook.<sup>18</sup>

### **Mobilizing Structures Promoting Collective Action**

Social media had considerable influence during the January 25 Revolution. It provided the mobilizing structure that connected to and leveraged existing social infrastructure, in the form of ongoing public protests. In addition, social media enhanced the legitimacy of the popular uprising and allowed for more favorable long-term geopolitical consequences. All of these attributes were on display during the April 6 Youth Movement.

The Movement had its beginnings on Facebook, which was first used in Egypt to mobilize a coalition of small groups based on networks of friends, relatives, and like-minded individuals. These individuals connected together and were dependent on the strength and safety that resides in numbers. As Mubarak’s regime began selling off state-owned companies in the 1990s to revitalize sectors of the economy, the public saw these deals as corrupt because economic conditions failed to improve.<sup>19</sup> Although workers tolerated corruption in the past, out of fear of arrest and physical harm from police, many found it easier to strike because skipping work was easier and less confrontational than facing security forces.<sup>20</sup> When Al-Mahalla Textiles workers decided to call a strike on April 6, 2008, opposition parties, professional associations, and Internet activists who labeled themselves as the April 6 Youth Movement decided to spread dissidence throughout Egypt.<sup>21</sup> While the strike ultimately foundered due to few actual participants, who numbered in the hundreds, the Movement drew over 70,000 followers online.<sup>22</sup>

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17. Wael Ghonim, *Revolution 2.0*, 26.

18. Osama Khaled, “Wael Ghonim: We Need to Unify Our Demands,” *Egypt Independent*, 2 September 2011, <http://www.egyptindependent.com/news/wael-ghonim-we-need-unify-our-demands> (accessed 22 May 2015).

19. Wael Ghonim, *Revolution 2.0*, 35.

20. Wael Ghonim, *Revolution 2.0*, 35-36.

21. Wael Ghonim, *Revolution 2.0*, 35-36.

22. Wael Ghonim, *Revolution 2.0*, 36.

## Control Challenges

The leaders of the April 6 Youth Movement used the power of social media to grow their own support while complicating the problem for Mubarak and the SSI. Expanding the mass base of the movement online increased its legitimacy, and instituting a horizontal structure for the movement increased its security and unity of effort. At the same time, such virtual growth also presented control challenges for the SSI. Although key individuals within the April 6 Youth Movement made up the area command and were responsible for organizing protests, SSI personnel struggled with identifying and stopping them all.

These struggles forced the SSI to try and prevent the mechanism of command and control of the movement instead by shutting off Internet access. Although the Mubarak government blocked Facebook and Twitter access from local Internet providers during protests in Tahrir Square, protesters found alternate ways to access these websites. The scale of Internet use in Egypt grew dramatically, well beyond the capacity of the SSI to monitor and control it. For example, Internet users expanded from 1.5 million in 2004 to more than 13.6 million by 2008, and methods of disrupting social networking, used previously in China and Iran, were no longer effective.<sup>23</sup> The other method of control used by the SSI, torturing suspects under its custody, also backfired. One of the April 6 Youth Movement's most prominent leaders took pictures of his tortured body to the media, leveraging technology to provide graphic evidence of the abuses by the Mubarak regime, and gaining protection, sympathy, and trust through public opinion.<sup>24</sup>

## Network Reliance and Relationship Formation

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23. For details, see Yigal Schleifer, "Why Iran's Twitter Revolution Is Unique," *Christian Science Monitor*, 19 June 2009, <http://www.csmonitor.com/World/Middle-East/2009/0619/p06s08-wome.html> (accessed 28 April 2015) and Ben Blanchard, "China Tightens Web Screws After Xinjiang Riot," *Reuters.com*, 6 July 2009, <http://www.reuters.com/article/2009/07/06/us-china-xinjiang-internet-idUSTRE5651K420090706> (accessed 28 April 2015).

24. Wael Ghonim, *Revolution 2.0*, 37 and Passant Darwish, "April 6 Decries Alleged Fresh Torture of Detainees," *Ahramonline.org*, 16 Feb 2014, <http://english.ahram.org.eg/WriterArticles/NewsContentP/1/94362/Egypt/AboutUs.aspx> (accessed 28 April 2015).

Just as the success of UW campaigns is reliant on networks and the formation of relationships, Ghonim's experience and knowledge of Facebook helped him to develop both over the Internet. Rather than focus on creating Facebook groups for widespread communications, Ghonim first built a Facebook page "friends" could "like." Doing this, he created a means of capturing everything he posted on his own page to now retransmitting it upon the "wall" of thousands and even millions of "friends."<sup>25</sup> The Facebook page not only allowed information to spread rapidly, but also ensured the entirety of his following masses would receive his critical updates.

The advantages of social networking were not only limited to Egypt. Protestors used Twitter hash tags in online conversations from neighboring countries throughout the region.<sup>26</sup> By picking up the conversation and relating it to their own lives, social networking users helped expand the conversation about freedom across the Arab World.<sup>27</sup> Ghonim also acted as the Twitter link and key network node to Western society by connecting a massive Egyptian social network, writing in Arabic, to external networks of English-speaking observers and sympathizers.<sup>28</sup>

External developments also generated interest in Western countries on the utility of social media as a tool for political protest and democratization. Three months before the January 25 Revolution, best-selling author Malcolm Gladwell wrote an article entitled "Small Change: Why the Revolution Will Not Be Tweeted." In this article, he argued that high-risk activism, such as the African-American Civil-Rights Movement in the U.S. during the 1950s and 1960s, succeeded because it was a "strong tie" phenomenon. Its success, Gladwell suggested, relied on the degree of personal connection civil-rights protestors had with the movement.<sup>29</sup> Gladwell also stated that activism via social media is built around weak ties because acquaintances one has never met are typically managed

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25. Wael Ghonim, *Revolution 2.0*, 43.

26. Philip N. Howard et al., "Opening Closed Regimes: What Was the Role of Social Media During the Arab Spring?" (Working paper, Project on Information Technology and Political Islam, University of Washington, Seattle, 2011).

27. Philip N. Howard et al., "Opening Closed Regimes."

28. Philip N. Howard et al., "Opening Closed Regimes."

29. Malcolm Gladwell, "Small Change: Why the Revolution Will Not Be Tweeted," *The New Yorker*, (October 4, 2010): 44, <http://archives.newyorker.com/?i=2010-10-04#folio=CV1> (accessed 22 April 2015).

via Twitter or Facebook, and these weak ties seldom lead to high-risk activism.<sup>30</sup> Next, he argued that social networks increase participation, but not motivation, as they do not ask people to make real sacrifices.<sup>31</sup> Finally, Gladwell discussed how nonviolent confrontations are high-risk strategies because any deviation from the plan delegitimizes the entire movement, and that social media's network structure involves loose-tie decisions made by a consensus, instead of a hierarchical structure involving strong-tie decisions made by a central authority.<sup>32</sup>

Although the January 25 Revolution disproved Gladwell's arguments, his article elevated discussion of social media and political protest to the national level. Gladwell missed the mark in his article because as a Westerner, his definition of "high-risk" differed from that of many Arabs. Simply put, Arab expected levels of trust and discontent with the status quo differed from the Western perspective. Since there are documented cases of Egyptian protesters dying to protect other "strangers" during the January 25 Revolution, Gladwell's criticism of virtual connections as being weak also seems inaccurate.<sup>33</sup> Egyptians linked together by social networks instead of hierarchies carried out the January 25 Revolution, and although it was a high-risk enterprise for its organizers and participants, Ghonim's leadership helped fulfill the area command role by setting goals and leading the mass base. Social networking applications, such as Twitter, also kept the area commanders informed by providing immediate news about major political changes in the region. Such information assisted those within area commands to align and coordinate their respective strategy.<sup>34</sup> Surprisingly, while the networks followed Ghonim's direction, they were also flexible enough not to implode when Egyptian police kidnapped Ghonim and interrogated him for 12 days. Finally, Gladwell downplayed and minimized the strength of virtual networks, as compared to real ones, and discounted the freedoms these virtual networks brought to the Arabs, especially

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30. Malcolm Gladwell, "Small Change," 45.

31. Malcolm Gladwell, "Small Change," 46-47.

32. Malcolm Gladwell, "Small Change," 48.

33. Rasha A. Abdulla, "The Revolution Will Be Tweeted: The Story of Digital Activism in Egypt," *The Cairo Review of Global Affairs*, (March 2011): 46, [www.aucegypt.edu/gapp/cairoreview/pages/articledetails.aspx?aid=89](http://www.aucegypt.edu/gapp/cairoreview/pages/articledetails.aspx?aid=89) (accessed 1 April 2015).

34. Philip N. Howard et al., "Opening Closed Regimes."

given the lack of rights and privileges within Egypt. Arab World social networks were effective because there was a feeling of patriotism within the network, they were given the freedom to choose whom to associate with, and a sense of belonging existed.<sup>35</sup>

### **Strength and Safety in Numbers**

Just as success in UW campaigns places great emphasis on strength and safety in numbers to create momentum, the leaders of the January 25 Revolution used social media to gain support for their movement and build a mass base. A crucial step in this process involved circulating a petition online for “ElBaradei’s Seven Demands for Change” to generate awareness and help individuals overcome their fear of State Security retaliation. A recipient of the Nobel Peace Prize in 2005 and Egypt’s highest state honor (the Order of the Nile) in 2006, most Egyptians saw Doctor Mohamed Mostafa ElBaradei as a source of national pride. He publicly expressed concern with Egypt’s governance and criticized Mubarak’s regime. Unsurprisingly, Mubarak retaliated with a state-run defamation campaign against ElBaradei almost immediately. However, while Mubarak ran a state-controlled media campaign, Ghonim promoted ElBaradei’s virtues on Facebook and Twitter.

After meeting with key opposition figures of the January 25 Revolution, ElBaradei drew up a list of seven demands for change he thought would promote the development of a true Egyptian democracy. ElBaradei also suggested publicizing the demands as a petition to pressure the regime to compromise, and he lent his weight and support for their distribution.<sup>36</sup> The organizers of the protest movement realized the Internet could quickly propel the movement, and to jump start it, they provided the first 100 signatures in order to calm public fears that State Security would retaliate after collecting signee information.<sup>37</sup> This online petition marked a pivotal point in the January 25 Revolution, because before it, opposition was largely contained and kept private due to individual and collective fears of SSI brutality. Thanks to the Internet’s

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35. Rasha A. Abdulla, “Revolution Will Be Tweeted,” 47.

36. For example, see “ElBaradei: Once the Snowball Rolls, It's Impossible to Stop,” *Ikwaweb.com*, 15 January 2011, <http://www.ikhwanweb.com/article.php?id=27837> (accessed 28 January 2015).

37. Wael Ghonim, *Revolution 2.0*, 45.

low cost of entry, global reach, and speed of dissemination, the January 25 Revolution established a mass base and grew exponentially. The Revolution's growth was due largely to the trust individuals had in the strength and safety associated with a large number of public followers.

### **Propaganda and Shaping Opinions**

The ability of social media to disseminate propaganda, and therefore shape public opinion during a UW campaign, is apparent in many examples during the January 25 Revolution. Mubarak retained control of the presidency in Egypt largely as a result of his ability to control information flows and messaging. Put another way, Mubarak made effective use of the state media to maintain stability within Egypt. After breaking a promise to limit his reign as president to two terms in 1993, he utilized control of the official press to portray him as the only hope for the nation.<sup>38</sup> Keeping the public ignorant of suitable alternatives, in conjunction with the use of an effective internal security service, Mubarak continued his rule without facing popular resistance. During the early 1990s, he maintained control of the media, such as television, radio, and newspapers, because they were state run and limited in distribution means and content. As information technologies became increasingly accessible and portable, however, Mubarak recognized that maintaining state control over the message, and the media that distributed it, would be difficult if not impossible. While state-run media sources during the 1990s gave Mubarak a higher level of control over messaging and content, the loosely controlled networks that would evolve during the late 2000s made it more difficult for the state to suppress movements. Privately-owned media outlets and the spread of satellite television, such as the Al Jazeera channel, also created control challenges for state leaders such as Mubarak, resulting in greater access to a wider variety of information, including balanced reporting, than state propaganda could provide. In sum, state propaganda's heavily edited content, controlled messages, and lengthy production times could not compete in the free marketplace of ideas, in which increasing numbers of Egyptian citizens had access.

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38. Wael Ghonim, *Revolution 2.0*, 31.



## Legal Challenges

Legal issues tend to surface when states are deciding how to counter social media and UW threats, and in the case of Egypt, its extension of emergency law during the January 25 Revolution was no different. Typically, states struggle with determining how to lawfully counter UW threats because of combatant status classification issues. States also find it difficult to lawfully respond to social media propaganda, often attempting to censor or block social media sites altogether, despite activist usage of alternate social media routes. To gain the upper hand on demonstrators, Egypt enacted an emergency law after the 1967 Six-Day War, which basically stripped demonstrators of freedom of speech and organization rights, but it also justified tyrannical actions by couching the law's necessity with stopping the threat of terrorism.<sup>39</sup> Although emergency law should only empower the government to extend police powers, suspend constitutional rights, legalize censorship, and abolish habeas corpus when a state of emergency is declared, Mubarak instituted a continuous state of emergency for the 30 year period he served as president, even after promising to replace it with proper anti-terrorism measures.<sup>40</sup> The death in police custody of a lawyer for Islamist militants sparked protests in Cairo in 1994, and Mubarak's continuation of emergency law ultimately played a major role in triggering the January 25 Revolution.<sup>41</sup> Mubarak used this law to repress demonstrations, even though he justified it as a way to prevent the Muslim Brotherhood from gaining power. At one point, sources estimated Mubarak's government was holding 30,000 political detainees.<sup>42</sup> While states that counter social media and UW threats must think through various legal challenges, Mubarak's implementation of a continued emergency law to counter these potential threats was downright illegal.

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39. Daniel Williams, "Egypt Extends 25-Year-Old Emergency Law."

40. May Kassem, *In the Guise of Democracy: Governance in Contemporary Egypt*, (New York, NY: Garnet and Ithaca Press, 1999), 57-58.

41. Kim Murphy, "Lawyers Threaten to Take Rights Dispute to Cairo Streets: Egypt: The Death in Custody of an Islamic Attorney and Detentions of Dozens More Spark Demand for Investigation," *Los Angeles Times*, 17 May 1994, [http://articles.latimes.com/1994-05-17/news/mn-58828\\_1\\_islamic-extremist](http://articles.latimes.com/1994-05-17/news/mn-58828_1_islamic-extremist) (accessed 22 May 2015).

42. R. Clemente Holder, "Egyptian Lawyer's Death Triggers Cairo Protests," *Washington Report on Middle East Affairs*, July/August 1994, <http://www.wrmea.org/1994-july-august/human-rights-egyptian-lawyer-s-death-triggers-cairo-protests.html> (accessed 22 May 2015).

## Privacy Issues

Although social media's openness and transparency also bring privacy challenges that run counter to the covert and clandestine character of UW operations, Ghonim proved that effective communication and identity protection were possible through social media. The SSI did not sit idly by during this time though, with a number of its officers posing as social media users and spreading misinformation through Facebook. In addition, SSI personnel continued efforts to identify online protesters in order to detain and interrogate them.

Realizing SSI's actions, Ghonim took precautionary measures to ensure his anonymity without sacrificing his ability to communicate. Establishing an administrative account, he masked his location by constantly changing his Internet protocol (IP) address among different countries through a proxy program called Tor, which routed his activities through more than 6,000 different relays.<sup>43</sup> Ghonim not only defended himself against privacy issues within social media, but also found ways to use it on behalf of his movement. For example, Ghonim searched for and compiled a list of over 400 police officers, and sent them friend requests and invitations to join his movement before they changed their Facebook privacy settings.<sup>44</sup> While some officers showed support, and others were opposed, this dialogue was a critical part of building strength to overcome individual and group fears that the SSI would identify, arrest, and torture protesters.<sup>45</sup> Although the SSI could not block Facebook, it turns out it did not need to. Instead, the social network's dedication to openness and transparency eventually led to the impediment of Ghonim's efforts. Once Facebook account managers realized Ghonim used fake accounts to control his page, which violated Facebook terms of use, they closed it. Although Ghonim built a sizable mass base of 300,000 users, and eventually retrieved his Facebook page, this example illustrates some of the challenges that social media's

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43. Wael Ghonim, *Revolution 2.0*, 82.

44. Wael Ghonim, *Revolution 2.0*, 100.

45. Wael Ghonim, *Revolution 2.0*, 101.



quest for openness and transparency presented to UW operations, which are characteristically covert and/or clandestine.<sup>46</sup>

While social media was not the cause of the January 25 Revolution, it certainly played a key role in accelerating and enabling activism. One measure of this role is the fact that social media organized, directed, and motivated dissenters only 11 days in advance of the January 25 Revolution.<sup>47</sup> The effectiveness of social media in popular mobilization is even more striking given the social context of Egypt. More than one-third of Egypt's population is illiterate and only 25 percent use the Internet.<sup>48</sup> A key demographic group more likely to be politically aware and active, the youth, were heavily in favor of democratization based on their exposure to content from social media. Activists conditioned by the repressive rule of Mubarak now understood what it meant to possess and wield power, whether by voicing an opinion online, or by casting a vote in their movement's decision-making process. Social media also provided a form of democratic communication. During Mubarak's authoritarian rule, communications took on a vertical structure, often coming from the top down.<sup>49</sup> With the advent of social media, however, communications took on more of a horizontal structure and Egyptian youth were now talked to or spoken with, instead of talked at (and, in many cases, down to) by the ruling regime.<sup>50</sup> While Twitter predominately relayed successful stories of mobilization between countries, Facebook functioned to capture political discontent within Egypt, and YouTube allowed citizen journalists to broadcast the stories mainstream media refused.<sup>51</sup>

## Conclusion

Reviewing Egypt's political history provides an appreciation for the historical significance and power demonstrated by the Arab Spring and January 25 Revolution, which were significantly enabled by social media. Intersections between social media

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46. Wael Ghonim, *Revolution 2.0*, 119.

47. Rasha A. Abdulla, "Revolution Will Be Tweeted," 41.

48. Rasha A. Abdulla, "Revolution Will Be Tweeted," 41.

49. Rasha A. Abdulla, "Revolution Will Be Tweeted," 45.

50. Rasha A. Abdulla, "Revolution Will Be Tweeted," 45.

51. Philip N. Howard et al., "Opening Closed Regimes."

and UW during the January 25 Revolution are realized through the mobilizing structures that promote collective action, control challenges, a reliance on networks and formation of relationships, strength and safety in numbers, propaganda and its effect on shaping opinions, and concerns over privacy. Understanding how social media affected the January 25 Revolution within Egypt to force Mubarak's resignation, we now turn to a study of social media's impact on the Hong Kong protests, how its outcome differs, and why.



## Chapter 4

### 2014 Hong Kong Protests Case Study

Social media played an important part in mobilizing protesters during both the January 25 Revolution and the 2014 Hong Kong protests. While the former has been reviewed in a wide range of studies and articles, the latter has received relatively little attention. Although the January 25 Revolution resulted in the resignation of Egypt's president and civil unrest continues today, little to no change in the status quo resulted from the 2014 Hong Kong protests, which activists limited to September through December of that year.

#### **A Brief History of Hong Kong**

Before one can understand why these movements resulted in different outcomes, much less the similarities and differences of social media's role between the two, it is necessary to provide a brief summary of Hong Kong's recent history in order to understand the reasons for recent protest. While Hong Kong became a British colony after China's defeat during the First Opium War from 1839 to 1842, the 1984 Sino-British Joint Declaration promised Hong Kong could keep certain freedoms and a high degree of autonomy for 50 years.<sup>1</sup> The Declaration also made the provision to transfer the colony to the People's Republic of China (PRC) in 1997, after which Hong Kong would be known as a Special Administrative Region (SAR) of the PRC. Hong Kong would benefit from the "one country, two systems" governing principle of the PRC that would allow the region to have its own economic and political system. Hong Kong also adopted its Basic Law in 1990, which was drafted as a joint venture between mainland China and Hong Kong, and will serve as the city-state's constitution until 2047. Since PRC leaders feared Hong Kong might become a subversive base against the mainland after the Tiananmen Square killings in 1989, they kept the Basic Law's policies for

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1. Patrick Keatley and Mary Louise O'Callaghan, "From the Archive, 27 September 1984: China's 50-Year Pledge On Capitalism in Hong Kong," *The Guardian*, 26 September 2011, <http://www.theguardian.com/theguardian/2011/sep/27/archive-china-capitalism-hong-kong-1984> (accessed 22 May 2015).

selecting Hong Kong's chief executive very vague, which eventually became the primary topic of debate. Furthermore, even though the Basic Law guarantees relative autonomy and freedoms to Hong Kong, it is open to interpretation by the PRC's de facto legislative body, known as the Standing Committee of the National People's Congress (NPCSC).

### **The 2014 Hong Kong Protests...What Started Them?**

Similar to the deaths of Bouazizi and Said triggering events in Tunisia and Egypt, a decision by the NPCSC to change Hong Kong's electoral system sparked the 2014 Hong Kong protests. Understanding this triggering event is important, because just as in UW, populations resist partly because a triggering event changes the tide and sways popular support to the resistance and against governing authority. Under current law, Hong Kong's chief executive candidates only have to win one-eighth of the support of its Election Committee, but under China's proposal, candidates would have to win an endorsement from at least half of the committee.<sup>2</sup> Because of the Election Committee's ties to Beijing and its business elite, activists expect Beijing will not nominate democrats under the proposal, and the new committee will screen out any candidates those in Beijing view unfavorably.<sup>3</sup> Hong Kong activists have specifically turned to Article 45 of the Basic Law for their arguments, which states, "The ultimate aim is the selection of the chief executive by universal suffrage upon nomination by a broadly representative nominating committee in accordance with democratic procedures."<sup>4</sup> Perceiving Beijing's involvement in the chief executive candidate selection process as opposing Article 45's democratic intent, the Hong Kong youth would soon take their concerns to the streets.

As in UW, populations resist because an insurgent leadership must exist to guide resistance efforts and exploit the situation. Just as the January 25 Revolution got its

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2. Chris Buckley and Michael Forsythe, "China Restricts Voting Reforms for Hong Kong," *The New York Times*, 31 August 2014, [http://www.nytimes.com/2014/09/01/world/asia/hong-kong-elections.html?\\_r=1](http://www.nytimes.com/2014/09/01/world/asia/hong-kong-elections.html?_r=1) (accessed 5 May 2015).

3. Chris Buckley and Michael Forsythe, "China Restricts Voting Reforms for Hong Kong."

4. Basic Law Promotion Steering Committee, "The Basic Law of the Hong Kong Special Administrative Region of the People's Republic of China," [http://www.basiclawn.gov.hk/en/basiclawn/text/chapter\\_4.html](http://www.basiclawn.gov.hk/en/basiclawn/text/chapter_4.html) (accessed 3 May 2015).

initial direction from an informal leader in Ghonim, several internal leaders initiated and sustained the 2014 Hong Kong protests. Beginning outside Hong Kong's government headquarters on 26 September 2014, demonstrations and civil disobedience protests spread throughout the Admiralty, Causeway Bay, and Mong Kok districts.<sup>5</sup> For the next two months, activists disrupted Hong Kong economic activity as they conducted sit-ins, protests, and strikes, demanding genuine universal suffrage and the resignation of Hong Kong's chief executive, Leung Chun-ying. The main components of the mass base and area command included: a group called Occupy Central With Love and Peace, led by Hong Kong University law professor Benny Tai, and two student groups separate from Occupy Central, but with similar goals.<sup>6</sup> These were Scholarism, led by Joshua Wong, and the Hong Kong Federation of Students, led by Alex Chow.<sup>7</sup> Tai, Wong, and Chow were instrumental to the movement because like UW, their groups resisted due to the existence of insurgent leadership that guided their efforts and exploited the situation.

Just as Gladwell's Western definition of high risk differed from the Arab one, so did Western media's understanding of the movement in Hong Kong. While the 2014 Hong Kong protests have taken on many names, which had a profound effect on outsider perceptions, the most widely known include the "Umbrella Revolution" and the "Umbrella Movement." While it was natural for many Hong Kong residents to keep an umbrella for sun protection, once the government authorized police to use pepper spray and tear gas, activists quickly realized the utility of their umbrellas against the crowd control measures. The umbrella quickly became the movement's most recognized symbol, as photo and video footage of activists armed with only their umbrellas spread via social media. Somewhat ironically, social media's power influenced the umbrella's transition from a political symbol of appeasement to one of defiance.<sup>8</sup> Seeing this and

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5. Bourree Lam, "The Geography of Hong Kong's Protests," *The Atlantic*, 30 September 2014, <http://www.theatlantic.com/international/archive/2014/09/the-political-geography-of-hong-kongs-protests/380925/> (accessed 22 May 2015).

6. Ivan Broadhead, "Who's Who in the Hong Kong Protests," *Voice of America*, 10 October 2014, <http://www.voanews.com/content/whos-who-in-hong-kong-protests/2479068.html> (accessed on 22 May 15).

7. Ivan Broadhead, "Who's Who in the Hong Kong Protests."

8. A transcript explaining how British Prime Minister Neville Chamberlain established the umbrella as a political symbol of appeasement can be found at Edward Miller,

misunderstanding activist goals, Western media opened Pandora's box by naming the movement an "Umbrella Revolution." This misunderstanding by Western media shows the impact social media has on perceptions. Without the proper setup or context, incomplete photo and video footage easily leads the outside observer astray. Powerful images, such as Tiananmen Square's "Tank Man" tend to influence judgment. This choice of terminology, instead of spreading awareness, or helping further the movement, played right into Beijing's hand.

Activists, with the help of local media outlets, quickly responded to media labeling by referring to their actions as part of "Occupy Central," the "Occupy Central conflict," and the "political reform storm" in order to appropriately convey their roots in the Occupy movement.<sup>9</sup> Leaders and supporters of Occupy also reiterated that revolution and overthrow of the Hong Kong government was not their goal, and that they sought full democracy and the right to directly elect the chief executive instead. Beijing, which had little to no direct control over Hong Kong's media, fought to influence mainland thought by censoring and blocking its own state-run media from releasing the truth about activist goals.

### **Propaganda and Shaping Opinions**

Leaders in Beijing saw the Western usage of "Umbrella Revolution" as an opportunity, exploiting the name to portray activists in a negative light while masking their goals from Chinese social media users. Mainland media sources also argued that protesters incited a revolution by demanding Leung's resignation. Activists countered this propaganda though by stressing their dissatisfaction with Beijing's involvement in Leung's selection, and not with the position of power itself. Besides the NPCSC's decision on electoral reform, disagreement between Hong Kong and Chinese government

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interview by Robert Siegel, "Hong Kong's Protest Umbrellas Have A Deep Political History," *NPR*, 30 September 2014, <http://www.npr.org/2014/09/30/352808170/hong-kongs-protest-umbrellas-have-a-deep-political-history> (accessed 25 May 2015).

9. Chris Yeung, "Don't Call Hong Kong's Protests an 'Umbrella Revolution:' How the Language of Revolt Hides Demonstrators' True Goals," *The Atlantic*, 8 October 2014, <http://www.theatlantic.com/international/archive/2014/10/dont-call-hong-kongs-protests-an-umbrella-revolution/381231/> (accessed 6 May 2015).

officials and pro-democracy activists also erupted over the definition of “rule of law.” While the former viewed protests as disobedient and disrespectful of the rule of law, and leveraged social media to vilify the activists as revolutionaries, the latter argued that rule of law should act as the check and balance system against absolute power of the government.<sup>10</sup>

### **Legal Challenges**

Although Chinese state media attempted to delegitimize activists by labeling their movement as a revolution, and subsequently declaring it as illegal because it opposed the rule of law, other political restraints and pressures were also in play. Because Hong Kong is a semiautonomous city-state with freedoms the mainland does not enjoy, the Chinese government had little legal authority over censoring or blocking Hong Kong’s media. Alternatively, China repressed its own citizens by blocking and censoring the Internet within its borders, as it saw Hong Kong’s quest for democracy and political reform as harmful to its communist society. Therefore, it made sense Beijing wanted to maintain political control of Hong Kong, because it feared China’s most international city might elect an opponent of the Communist Party.

### **Control Challenges**

Just as Tahrir Square protesters found alternate ways to access websites Mubarak’s government had blocked, Hong Kong supporters jumped the “Great Firewall of China” that blocked foreign social media applications by using proxy servers and virtual private networks (VPNs).<sup>11</sup> While domestic social media programs could have

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10. David Pilling and Julie Zhu, “Hong Kong Tussles Over ‘Rule of Law’,” *Financial Times*, 14 January 2015, <http://www.ft.com/cms/s/0/36c76598-9bcd-11e4-a6b6-00144feabdc0.html#axzz3axC8qva9> (accessed 22 May 2015).

11. A proxy server is a computer that acts as a gateway between a local network and a larger network, like the Internet. A proxy server blocks direct access between the two networks, strengthening security by making it more difficult for outsiders to obtain IP addresses or private network details. For an overview, see “What Is A Proxy Server,” The Indiana University Knowledge Base, <https://kb.iu.edu/d/ahoo>. A VPN extends a private network across a public one, such as the Internet, which allows a computer to send and receive data across the public network while utilizing the security benefits of the



also been blocked, they tended to cooperate with Chinese censorship. For example, China's commercially provided hybrid of Facebook and Twitter is known as Weibo, which censored political topics by filtering blacklisted keywords and monitoring user accounts. China's filters were not perfect, however, and after realizing images take longer to censor because there are no words in the post to trigger the filter software, Hong Kong supporters published photographs of themselves holding up support messages on Weibo.<sup>12</sup> Although the CCP leaders felt threatened by these dissidents and separatists, they were not the Party's only worries. The CCP leaders were also concerned that continuing protests would initially harm the economic ties China had developed with Taiwan, since Taipei media outlets covered the protests as they unfolded, and might ultimately lessen any chances of political unification. Relative to Egypt, China's options for directly ending the Hong Kong protests were limited because of its contractual agreements with its semiautonomous SARs, as well as the political precedent it might set for future integration of Taiwan into "one China."

Internet disruption also created a need for an alternative form of communications, and social media solutions matured to fulfill this role. The best example of this involves use of the FireChat mobile application, which allowed protestors to connect via Wi-Fi or Bluetooth with others for free, without relying on an Internet connection or cellular phone coverage. As FireChat connected with other users within 200 feet, it relieved itself of the typical constraints posed by standard Internet networks by forming a P2P network that could extend its range by multihopping.<sup>13,14</sup> This structure allowed protestors to establish

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private network. For an overview, see Vangie Beal, "VPN-Virtual Private Network," <http://www.webopedia.com/TERM/V/VPN.html> (accessed 22 May 2015).

12. Huey Fern Tay, "Hong Kong Student 'Umbrella Revolution' Movement Takes to Social Media to Separate Fact From Fiction In Pro-Democracy Protests," *ABC*, 30 September 2014, <http://www.abc.net.au/news/2014-09-30/feature-social-media-use-in-hong-kong-protests/5780224> (accessed 6 May 2015).

13. Multihopping transfers information packets or signals between carrier-owned equipment (relay) or subscriber-owned (mesh). For an overview, see the briefing by Ray-Guang Cheng, "Multihop Wireless Networks," [mimo-mesh.com/media/ray.pdf](http://mimo-mesh.com/media/ray.pdf) (accessed 7 May 2015).

14. D.J. Pangburn, "How the Hong Kong Protests Forced Firechat to Evolve," *Motherboard*, 10 October 2014, <http://motherboard.vice.com/read/what-firechat-learned-in-hong-kong> (accessed 22 May 2015).

communications with each other despite the threat of Hong Kong police disrupting the Internet and cell service interruptions caused by concentrations of mobile users in a high-density urban environment. Although the mesh network FireChat forms is public and not encrypted, it is more reliable and redundant than typical client-server networks, since failure of an individual node does not result in complete network failure. Although FireChat plans to offer encrypted, private messaging, Hong Kong activists were not concerned about anonymous communications. Unlike SSI efforts to identify, detain, and interrogate online protesters in Egypt, Hong Kong activists did not face the same threats. Hong Kong activists were more concerned with having access to a decentralized network that remained unaffected by police Internet disruption or cell service overload. This network resiliency allowed activists to plan, organize, coordinate, and communicate, even in light of corrupted print and television media providers, threat of Internet disruption, and cell service interruption.

Virtual networks have not only been used to sidestep government control, but have also forecasted when periods of social uprising are most likely to occur. In addition, such networks offered a level of identity protection for its users. During the Arab Spring and Hong Kong protests, the Hotspot Shield VPN saw a significant rise in popularity. With governments shutting down access to Facebook, YouTube, and Twitter websites during the Arab Spring, protesters transitioned to Hotspot Shield with a corresponding tenfold increase to one million participants.<sup>15</sup> Also, as Hong Kong's political uprisings and Chinese government censorship of its Internet began, the VPN saw a 1,000 percent increase in usage.<sup>16</sup> Despite government attempts to suppress protest movements by blocking Internet websites, Hotspot Shield bypassed these barriers by emailing the free application out to its users. Unlike FireChat, which operated on a public, unencrypted network, Hotspot Shield afforded a level of privacy for its users. After downloading the application via email, users accessed websites on foreign servers outside of China's control, which also scrubbed and removed all location and identity information after they

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15. Karsten Strauss, "Hong Kong Protests: Beating the Media Crackdown," *Forbes*, 30 September 2014, <http://www.forbes.com/sites/karstenstrauss/2014/09/30/hong-kong-protests-beating-the-media-crackdown/> (accessed 2 May 2015).

16. Karsten Strauss, "Hong Kong Protests."

logged off.<sup>17</sup> Providing an uncommon level of social media accessibility and privacy to mainland Chinese allowed them to seek out the truth, without fear of retaliation.

### **Network Formation Leading to Empowerment**

Besides finding technological solutions to corrupt Hong Kong media providers, activists also discovered the influential power well-placed symbols could have within social media. Just as social media quickly spread awareness of Bouazizi's self-immolation in Tunisia, and Said's brutal death in Egypt, it also gained the attention of the world by rapidly disseminating symbolic images of the Hong Kong protests across the globe. The most famous image from the movement consists of an unidentified and defiant pro-democracy protester holding up an umbrella as he stands among a cloud of police tear gas near the Hong Kong government headquarters.<sup>18,19</sup> Because idealistic students demanding greater democratic rights sparked both the Tiananmen Square and Hong Kong demonstrations, "umbrella man" reminds many of the iconic image of the "tank man" Chinese protester who stood in front of a column of tanks making their way through Tiananmen Square more than 25 years ago.<sup>20,21</sup> Although there is no reliable information about the identity of either the "tank man" or "umbrella man," both acts evoked an emotional response because the symbolic individual represents the movement as a whole. Although Quang Duc's protest against the persecution of Buddhists by the South Vietnamese government in 1963 and the "tank man" actions during the June Fourth Incident in Tiananmen Square in 1989 were not dependent on social media, few

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17. Karsten Strauss, "Hong Kong Protests."

18. For an example, see <http://www.buzzfeed.com/franciswhittaker/extraordinary-pictures-of-hong-kongs-umbrella-revolution#.nyka6RDZW> (accessed 7 May 2015).

19. See the symbolic "umbrella man" photograph on the cover of *Time* magazine at Hannah Beech, "Hong Kong Stands Up," *Time*, 1 October 2014, <http://time.com/3453736/hong-kong-stands-up/> (accessed 20 May 2015).

20. Adam Taylor, "The Humble Umbrella's Surprising Role in Hong Kong's Huge Protests," *The Washington Post*, 29 September 2014, <http://www.washingtonpost.com/blogs/worldviews/wp/2014/09/29/the-humble-umbrellas-surprising-role-in-hong-kongs-huge-protests/> (accessed 3 May 2015).

21. Access the iconic "tank man" photograph at Mee-Lai Stone, "Stuart Franklin: How I Photographed Tiananmen Square and 'Tank Man'," *The Guardian*, 3 June 2014, <http://www.theguardian.com/artanddesign/photography-blog/2014/jun/03/stuart-franklin-tiananmen-square-tank-man> (accessed 20 May 2015).

would argue television and print media of their time cannot compete with social media's pervasiveness and speed of transmission.

In UW, populations resist partly because a significant portion of the population perceives it has nothing to lose by revolting and that success is possible. While they technically did not consider their actions as a revolt, Hong Kong's youth realized that democratic alternatives existed and were obtainable, thanks in part to the breadth of the Internet and social media. The belief in success was a major reason why their movement began. While social media played an important role in planning, organizing, and coordinating a sustained movement for over two months, not all Hong Kong generations saw the utility within it. While the Communist Party saw Hong Kong as having plenty of freedoms, the well-educated younger generation of Hong Kong residents disagreed. Hong Kong residents under the age of 30 grew up living in a semiautonomous Hong Kong, and likely did not remember the suppressive efforts of the Chinese government after the Tiananmen Square incident of 1989. There was a definite generational divide between the elderly, who feared challenging Beijing might cause Hong Kong to lose its freedoms, and the youth, who expected political autonomy.<sup>22</sup> Thanks to the Internet and social media, Hong Kong youth evolved into a well-informed generation, enjoying Western-style freedoms and more aware of life outside their borders. While older Hong Kong generations wanted to maintain economic harmony with Beijing and viewed the protests as bringing instability to a city-state they have worked so hard to develop, younger ones did not feel the same economic and social connection to mainland China.<sup>23</sup>

### **2014 Hong Kong Protests Results**

Many referred to the Hong Kong protests as an "Umbrella Revolution," yet unlike in Egypt, no change in government took place. Can one argue then that the Hong Kong

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22. Kathy Chu and Fiona Law, "Hong Kong Protests Expose Generational, Economic Divide," *The Wall Street Journal*, 28 September 2014, <http://www.wsj.com/articles/hong-kong-protests-expose-generational-economic-divide-1411921313> (accessed 22 May 2015).

23. David Pierson, "Many Hong Kong Parents Just Don't Understand Student-Led Protests," *Los Angeles Times*, 14 October 2014, <http://www.latimes.com/world/asia/la-fg-hong-kong-generations-20141014-story.html#page=1> (accessed 20 May 2015).

protests were a failure? Other than government promises by Hong Kong officials to highlight political reform concerns in a report to Beijing and explore Hong Kong youth and student political involvement options, there have been no changes to the NPCSC's decision on Hong Kong electoral reform.<sup>24</sup> But, looking also at the movement's processes reveals a better understanding of the movement's effectiveness. Hong Kong's democracy movement started with the 1984 Sino-British Joint Declaration, yet still continues after 30 years.

### **Mobilizing Structures Promoting Collective Action**

Contrasting Hong Kong's relatively free society against the repressive Egyptian political environment, some believe social media's role in the Hong Kong protests was more documentary than mobilizing. Studying social media usage, however, reveals it was just as valuable in helping Hong Kong protesters rise up against a concerned and repressive Chinese government.<sup>25</sup> Social networking sites and applications played a crucial part in mobilizing protesters since many of Hong Kong's television station and newspaper owners enjoyed business relations with mainland China, which influenced many of them to keep a conservative editorial line.<sup>26</sup>

Even though the Occupy Central With Love and Peace movement eventually retreated from the streets of Hong Kong, it is not over. This non-violent approach may take time, but as American political scientist Erica Chenoweth and strategic planner Maria Stephan have theorized, civil resistance has a higher success rate for political

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24. Kenneth Lau and Kevin Cheng, "New Occupy Report to Beijing Promised," *The Standard*, 22 October 2014, [http://www.thestandard.com.hk/news\\_detail.asp?pp\\_cat=30&art\\_id=150623&sid=43206834&con\\_type=3](http://www.thestandard.com.hk/news_detail.asp?pp_cat=30&art_id=150623&sid=43206834&con_type=3) (accessed 5 May 2015).

25. Matthew Hilburn, "Social Media Documenting, Not Driving, Hong Kong Protests," *Voice of America*, 1 October 2014, <http://www.voanews.com/content/social-media-documenting-not-driving-hong-kong-protests/2468696.html> (accessed 2 May 2015).

26. Jonathan Kaiman, "Hong Kong Protests Bring Crisis of Confidence for Traditional Media," *The Guardian*, 28 October 2014, <http://www.theguardian.com/world/2014/oct/29/hong-kong-protests-confidence-media> (accessed 27 April 2015).

change than violent resistance.<sup>27</sup> After presenting evidence from four case studies, Chenoweth and Stephan argued that nonviolent campaigns have lower moral, physical, informational, and commitment barriers to participation.<sup>28</sup> They also argued that mobilization among local supporters is a more reliable source of power than using external allies, and that nonviolent resistance campaigns are not only more likely to establish a democratic regime, but they are less likely to relapse into civil war afterwards.<sup>29</sup> Finally, Chenoweth and Stephan offer promise for the youth of Hong Kong, finding that when nonviolent resistance movements succeed, there is a much better chance of becoming democratic within five years, but even those that fail show potential for democracy over time.<sup>30</sup> With the help of social media, the Hong Kong protests worked to mobilize the city-state's youth, a typically apolitical part of society, into political activism.

This movement also deepened the divide between older generations in Hong Kong growing up under British rule and remaining entrenched in their support to their political masters in Beijing, and younger generations expecting greater political autonomy and freedom. Telephone interviewees proved the divide is deepening when they conducted five Hong Kong public opinion surveys between September of 2014 and March of 2015. Using a random sampling method, the sample sizes varied from 802 to 1,030 Hong Kong citizens aged 15 and older.<sup>31</sup> The Chinese University of Hong Kong asked citizens to what degree did they support the Occupy Central movement. Averaging the five surveys, the data shows 57 percent of participants ages 15 to 24 supported the movement. Compare that to 40 percent for age 25 to 39, 26 percent for age 40 to 59, and 24 percent for ages 60 and older.<sup>32</sup>

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27. Erica Chenoweth and Maria J. Stephan, *Why Civil Resistance Works: The Strategic Logic of Nonviolent Conflict* (New York, NY: Columbia University Press, 2011), 220.

28. Erica Chenoweth and Maria J. Stephan, *Why Civil Resistance Works*, 10.

29. Erica Chenoweth and Maria J. Stephan, *Why Civil Resistance Works*, 10.

30. Erica Chenoweth and Maria J. Stephan, *Why Civil Resistance Works*, 219.

31. The Chinese University of Hong Kong, "*Hong Kong Public Opinion and Political Development Opinion Survey (First Through Fifth Round Survey Results)*", Centre for Communication and Public Opinion Survey (September 2014 through March 2015).

32. The Chinese University of Hong Kong, "*Hong Kong Public Opinion and Political Development Opinion Survey*."



## Conclusion

It is no surprise Beijing blamed Hong Kong's activism on the Western nations, given its goal of full democracy, but the way the Western media responded is somewhat surprising. Just days after the demonstrations began, the Consulate General of the U.S. for Hong Kong and Macau stated that the U.S. supports Hong Kong's traditions and recognized freedoms, but does not take sides in the political development or support a specific group.<sup>33</sup> It also discouraged an escalation in tensions, and recommended restraint and peaceful expression.<sup>34</sup> Despite this neutral stance, Western media seems to have published its perception without an appreciation for the power of social media. By labeling the movement as a revolution and publishing it across various forms of social media, Western media gave Beijing the terminology it would use to portray the activists in a negative light and argue their protests as illegal activity opposing the rule of law. Although the Hong Kong protests resulted in no change to Beijing's electoral reform decision, the Hong Kong youth are more politically active than they have ever been, and a resurgent activism is likely imminent.

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33. Consulate General of the United States, "U.S. Consulate General Statement-Public Demonstrations in Hong Kong," 29 September 2014, [http://hongkong.usconsulate.gov/pas\\_pr\\_2014092901.html](http://hongkong.usconsulate.gov/pas_pr_2014092901.html) (accessed 6 May 2015).

34. Consulate General of the United States, "U.S. Consulate General Statement."



## Chapter 5

### Conclusion

#### **Summary of Findings and Conclusions**

The sophisticated social media presence of DAIISH has been the latest and most visible example of an effective campaign to further beliefs and gain support using social media, begging for some sort of response from Western democracies. Before developing a strategy to discredit, counter, or stop DAIISH's use of social media, it is necessary to understand the role of social media within UW. This paper began by scoping and defining the vast and relatively new landscape of social media, and in the process, examined its nine most relevant forms. Next, it explained how social media enable rapid global communications, as well as form interactive networks. Then, this thesis explored the older (but not necessarily more clearly defined) concept of UW. Relying heavily on existing Army doctrine, with an understanding that joint doctrine is in the works, I proposed a working definition for UW. I also discussed concept terminology, components, composition, organization, campaign phases, important factors, and reasons for popular uprising. Finally, I identified, magnified, and explained the intersecting and diverging areas of social media and UW.

The theoretical and conceptual discussion and comparison of social media with UW formed the basis for analysis and comparison of two recent protest movements. Both movements benefitted to one degree or another from the use of social media. The first movement, Egypt's January 25 Revolution, demonstrated that many of its engineers and facilitators unconsciously used social media in ways consistent with UW phases. I examined the 2014 Hong Kong protests next, and although ostensibly labeled by outsiders as a failure, its leaders also used social media in ways consistent with the principles of UW. Their goals, however, were much more modest than those of the protesters involved in Egypt's January 25 Revolution.

This thesis concludes with a number of findings, discussed below, that should enhance our present-day understanding of the relationship between social media and UW.

In addition, the following discussion draws upon the finding of the theoretical and case study investigation to identify a number of practical and pragmatic implications and recommendations for the future.

First, the very nature of social media, existing virtually in cyberspace, has an irregular character that complements UW. Much like UW, social media influence others, rely upon relationships and networks, and are population-centric. Social media and UW tend to favor indirect and asymmetric approaches, typically competing for power in terms of influence, as opposed to power in its physical form.

Next, social media are also affected by security-control tradeoffs, the essential problem of UW. UW operations tend to involve a centralized level of control from the area command, and a decentralized level of execution within the mass base. Given the covert and/or clandestine nature of UW actions, necessary to ensure the survival of the proxy group and a degree of deniability for the sponsor, controlling guerrilla actions via communications is typically limited out of security fears. The levels of security and control in social media, in a related degree, are dependent on the network's architecture and whether or not it utilizes the less resilient and more controllable client-server model, or the more resilient but less controllable P2P construct. Although the Egyptian government was able to block client-server network architectures, such as Facebook and Twitter, from local Internet providers during protests in Tahrir Square, protestors and their facilitators were able to discover alternate ways to access these websites. Mobile applications using a P2P architecture, such as FireChat, were more resistant to state controls because they did not rely on Internet connections, cellular phone coverage, or a more easily controlled central server. Mobile applications, or distributed control, also complicated censorship problems for the Egyptian and Chinese states. Although leaders in these states exerted varying forms of control over state-run media, this study concluded that absolute control of social media was not feasible. Finally, proxy servers, VPNs, Tor, and Hotspot Shield also allowed protestors to bypass suppressive blocking and censorship attempts by the Egyptian and Chinese states, proving that external actors and commercial technology providers can and will find workarounds to state control measures.

This thesis also tempered expectations that social media are a panacea for waging UW. Social media are also not the cause of revolutions and political movements, but can serve instead as a means to catalyze them. Social media can act as a mobilizing agent to help spur on collective action by helping recruit, train, generate resources, command and control, connect, and coordinate UW operations. On the one hand, social media flatten out communications into a more receptive horizontal structure. By utilizing the existing social infrastructure, social media not only enhance legitimacy, but they also offer a more institutionalized form of mobilization and can, in limited cases, allow for more favorable long-term geopolitical consequences.<sup>1</sup> On the other hand, however, the widespread availability and ease of use of social media make them an informative network, albeit one composed of shared information where reputation, trust, and reliability of information can be called into question. A user's ease of access to social media highlights its utility in information distribution, but this utility is also susceptible to the transmission of disinformation and propaganda.

Since social media and UW both strive to create and rely on networks and relationships, whether virtual or real, they both offer protection to individuals via safety in numbers, while mitigating the risk of dissent. Being part of a collective group not only empowers those within the mass base to act without fear of individual security or safety concerns, but also builds trust among them, which mitigates the risk of individuals placing their goals above the collective ones. The January 25 Revolution demonstrated that social media can enable strong-tie relationships to form, as it coordinated the high-risk activism in Cairo's Tahrir Square. While Gladwell's argument may be true that nonviolence is a high-risk strategy because deviations from the plan delegitimize the movement, Chenoweth and Stephan have compiled substantial evidence that nonviolent campaigns have lower moral, physical, informational, and commitment barriers to participation than scholars previously thought.<sup>2,3</sup> Growing participation, given these

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1. Doowan Lee, "A Social Movement Approach to Unconventional Warfare," *Special Warfare* 26, no. 3 (July-September 2013): 29.

2. Malcolm Gladwell, "Small Change: Why the Revolution Will Not Be Tweeted," *The New Yorker*, (October 4, 2010): 48, <http://archives.newyorker.com/?i=2010-10-04#folio=CV1> (accessed 22 April 2015).

lower barriers to participation, gives momentum to a movement and builds trust. Trust, the cardinal requirement of both social media and UW, counters the likelihood of deviations that may delegitimize a nonviolent movement. In other words, the wisdom and action of the crowd will be able to shout or shut down any outliers or *agents provocateur*.

Although Gladwell also argued that social media only fosters participation, the theory and case study chapters also suggest they can be an effective means of motivation.<sup>4</sup> One way social media motivate is by publicizing iconic symbols to evoke emotions. Quickly and widely distributing images of a badly burned Bouazizi, a brutally beaten Said, and an anonymous “umbrella man” amid police tear gas and pepper spray became the motivational (and iconic) symbols individuals associated with and rallied around, building strength for the January 25 Revolution and 2014 Hong Kong protests.

Studying the January 25 Revolution and 2014 Hong Kong protests revealed movement leaders, such as Ghonim, Tai, Wong, and Chow used social media *after* they formed their area command, to grow discontent with the status quo and organize a transition from individual to popular resistance. Stated in a different way, social media proved useful only after the movement leaders conducted the initial organizational phase of UW; it was not a replacement for effective leadership and direction. Both movements skillfully used the low cost of entry, global reach, and speed of information dissemination of social media to fulfill the three tenets of UW that allow discontent to take the form of insurrection. First, by enabling the formation of strong-tie connections while revealing alternative forms of governance that exist across the globe, social media convinced a significant portion of the population they had nothing to lose by revolting, and success was possible.<sup>5</sup> Second, social media publicized several key events that highlighted the existence of corrupt and suppressive environments, and triggered a sway in popular

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3. Erica Chenoweth and Maria J. Stephan, *Why Civil Resistance Works: The Strategic Logic of Nonviolent Conflict* (New York, NY: Columbia University Press, 2011), 10.

4. Malcolm Gladwell, “Small Change,” 46-47.

5. Training Circular (TC) 18-01, *Special Forces Unconventional Warfare*, 28 January 2011, 2-1.

support to the resistance and against the governing authority.<sup>6</sup> Finally, social media informed area commanders, helped them align and coordinate their strategy, and provided a means to guide resistance efforts and exploit their situations.<sup>7</sup>

### **Pragmatic Implications of the Study**

Being armed with an enhanced understanding of the relationship between social media and UW allows us to put recent global events into perspective and draw sensible, realistic, and practical conclusions from them. First and foremost, DAIISH is likely the most publicized social media exploiter that has enjoyed relative success in furthering their beliefs and gaining support for their cause. Also, the recent annexation of the Crimean peninsula by Russia has entailed a sophisticated and secret social media effort to justify the federation's actions to a widely disapproving international community. Finally, even the reclusive country of North Korea has shown it is willing to assume some level of security risk by establishing ties to the Internet and social media in order to disseminate propaganda outside its borders.

While the Egyptian and Chinese states used social media to control their populations, DAIISH has developed strong ties with its supporters and recruits. DAIISH resonates with a particular crowd because of their idea-based approach, but relies heavily on social media to spread their beliefs and find others who agree. DAIISH has been extremely effective on the social media front for several reasons. First, they have specifically targeted a younger and frustrated crowd that is susceptible and willing to listen. Second, they have built a convincing argument for joining their cause by offering inspiring rhetoric that plays off ideas, beliefs, and emotions that are attractive to their message recipients. Third, DAIISH has found a way to effectively exploit and leverage the intensifying power of social media. Social media's vastly interconnected networks carry great power in their ability to amplify issues, and DAIISH has cleverly created an appearance of strength and risk perceptions that influence political attitudes and

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6. Training Circular (TC) 18-01, *Special Forces Unconventional Warfare*, 2-1.

7. Training Circular (TC) 18-01, *Special Forces Unconventional Warfare*, 2-1.

behaviors.<sup>8</sup> DAIISH has mastered producing just enough noise via social media to generate mainstream media coverage, which then magnifies it, but it has also been unable to engage large groups of people directly.<sup>9</sup> Social media's openness and accessibility has allowed DAIISH to not only effectively recruit and solicit funding via the Internet, but also to threaten its enemies with graphic posts that are no longer accessed and spread by its supporters, but by anyone interested in following their progress. Although many find their brutal online videos and photos reprehensible, there are still those who access them out of curiosity, propagating their message and adding to their momentum.

Before and during the controversial Russian military intervention and annexation of the Crimean peninsula, Russian President Vladimir Putin led a secret social media movement to justify the Kremlin's actions and counter the international view that Crimea's annexation was illegally conducted. Putin's widespread social media propaganda involved fictitious writers, staged photos, and the spread of rumors in order to shape public opinion in Russia, Ukraine, and the West.<sup>10</sup> Much like Mubarak's control over social media during the January 25 Revolution, Putin also leveraged social media control in order to suppress freedoms of speech and information. The Kremlin's actions to control the narrative included restraining Russia's independent press, touting Ukraine's revolution as reminiscent of fascism, and passing off armed Russian troops in Ukraine as upholding local self-defense missions.<sup>11</sup> Putin's actions have not only highlighted social media's power, but also the prominence it holds in the struggle to win the information war.

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8. J.M. Berger, "How ISIS Succeeds on Social Media Where #StopKony Fails, Even With Fewer Clicks," *The Atlantic*, 16 March 2015, <http://www.theatlantic.com/international/archive/2015/03/how-isis-succeeds-where-stopkony-fails/387859/> (accessed 14 May 2015).

9. J.M. Berger, "How ISIS Succeeds on Social Media Where #StopKony Fails."

10. Paul Roderick Gregory, "Inside Putin's Campaign of Social Media Trolling and Faked Ukrainian Crimes," *Forbes*, 11 May 2014, <http://www.forbes.com/sites/paulroderickgregory/2014/05/11/inside-putins-campaign-of-social-media-trolling-and-faked-ukrainian-crimes/> (accessed 15 May 2015).

11. Alan Yuhas, "Russian Propaganda Over Crimea and The Ukraine: How Does It Work?," *The Guardian*, 17 March 2014, <http://www.theguardian.com/world/2014/mar/17/crimea-crisis-russia-propaganda-media> (accessed 15 May 2015).



While researchers have explored social media censorship examples in Egypt, China, and Russia, North Korea's level of control surpasses them all. Although North Korea limits Internet access to North Korean elites, propagandists, hackers, and researchers, it also lets privileged North Koreans utilize a filtered and monitored Intranet.<sup>12</sup> Limiting network access to highly placed North Koreans mitigates the risk that they will use it against the state. By removing the majority of its population from the open and vulnerable Internet, and placing them on a closed Intranet, North Korea also lessens the compellent power that outside states can leverage. North Korean opponents realized this when the country's Internet was temporarily shut down after attributing the Sony Pictures Entertainment cyber attack to Pyongyang, but the resultant disruption was minimal due to North Korea's relative independence from the network. Although many think of North Korea as being completely removed from social media, the establishment of its own website, Facebook page, YouTube channel, Twitter account, and Flickr page reveals that its government sees value in distributing propaganda messages outside its borders via social media, and is willing to trade some security for access.

The reader should glean two pragmatic implications from studying recent DAIISH, Russian, and North Korean social media efforts. First, U.S. SF should consider social media utilization as not only for public information and recruiting, but also as a direct or indirect means of UW for states to advance their aims. In the case of DAIISH, the group's leaders have leveraged social media as a direct means of UW by developing strong ties with its supporters and recruits. In other words, DAIISH has used social media as a means of influencing its various audiences, but mostly as a means of attracting a specific population to the group—as a tool for recruiting. Russia, however, has used social media as a direct means of UW in conjunction with its clandestine use of force in Crimea and Eastern Ukraine. Social media, in this context, are not used directly to mobilize but rather shape external perception to a specific message: despite well-documented evidence of Russian presence in Ukraine, social media messaging attempts

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12. Tong-Hyung Kim and Youkyung Lee, "Look at How Bizarre North Korea's 'Internet' Is," *Business Insider*, 23 December 2014, <http://www.businessinsider.com/a-look-at-north-koreas-tightly-controlled-internet-services-2014-12> (accessed 15 May 2015).



to cast doubt on such evidence in support of the UW campaign. Lastly, in North Korea, social media have been used as a direct means of UW as part of a coercive campaign against Western governments and corporations such as Sony. Given the highly restricted Internet and Intranet access within the country, North Korean attempts to cast hacker and social media as the actions of mysterious third parties—the plausible deniability that characterizes IW—rings hollow indeed.

The second practical conclusion stresses viewing social media responses not through the lens of how a state should handle another state or organization, but rather on the basis of the political precedent willing to be set.<sup>13</sup> While a terrorist organization like DAIISH portrays violence via social media, which clearly violates user agreements and justifies account suspensions, states should approach social media censorship with the realization that absolute censorship is not possible and that other extremist organizations will not likely take the same approach.<sup>14</sup> There is also a fine balance between countering DAIISH narratives by blocking social media access altogether, and cutting off a primary intelligence-gathering means.

### **Recommendations**

Appreciating social media's irregular character, practitioners do not necessarily have to leverage social media to replace conventional warfare, but can aim to supplement it. Strategists and senior military leaders frequently weigh the risks versus rewards of conducting different forms of warfare, but they can direct the conduct of virtual warfare during conventional warfare to help mitigate conventional military disadvantages. "Hybrid warfare" strategies have begun incorporating this suggested blend of conventional and irregular forms of warfare. Senior decision makers also remain extremely sensitive to committing U.S. troops to hostile areas of the world. While deciding whether or not to place "boots on the ground" speaks volumes about U.S.

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13. Lauren Walker, "Inside the ISIS Social Media Campaign," *Newsweek*, 6 March 2015, <http://www.newsweek.com/inside-isis-social-media-campaign-312062> (accessed 14 May 2015).

14. Lauren Walker, "Inside the ISIS Social Media Campaign."

commitments and interests, social media provide senior decision makers with a remote warfare capability that lowers the cost of commitment.

When developing a virtual war fighting strategy, context is extremely important. The target population will help resolve if, and what type of, social media campaign will be most effective. While microblogging, such as Twitter, may influence an urbanized, educated, and connected population, planners should use simpler means to target rural areas with illiterate populations, such as video sharing programs like YouTube.

Given social media's role in UW, the paradigm of how SF should recruit, train, and organize to conduct and combat this threat should change. SF established a reputation of being able to fight the Communist revolutionary warfare threat of the day in the 1960s, which involved using its own tactics against it. As the threat has changed, based on the new means of mobilization (social media), perhaps the training and organizing of SF should evolve as well. Instead of evaluating physical attributes, social media acumen and experience might be a more important determiner during SF selection. UW culmination exercises during SF selection, such as ROBIN SAGE, either should incorporate social media problems into the scenario to test a soldier's skill or replace outmoded scenarios altogether. A next logical step might be to build regionally focused SF battalions, regiments, and groups relying heavily on virtual connection and social presence instead of a physical one. Since social media are a relatively new form of communication and information sharing, they have resonated strongly with the "Digital Native" younger generations who have grown up using them. Since Millennials are more inclined to understand social media's potential with regard to spurring on activism, recruiters should pursue this generation to provide options to senior leaders. In all likelihood, however, even the most unconventional senior leaders within the SF community will likely remain set in their familiar ways, distance themselves from social media, and fail to appreciate their implications and full capabilities.

Although the U.S. State Department combats DAIISH online recruiting attempts through its "Think Again, Turn Away" social media program, measuring success is difficult. If the U.S. and its allies want to effectively discredit the DAIISH narrative, it should be done by a knowledgeable and credible source. Enlisting practicing Muslims

and allowing them to discuss and debate the finer points of Islam with DAIISH members and supporters is one way. Such social media users could draw upon their comprehensive knowledge of the religion to intellectually dismiss DAIISH propaganda via social media, while maintaining an empathetic approach towards the target audience. Such methods could go a long way in building trust and credibility, and ultimately countering the violent extremist message on social media associated with DAIISH.

The 2014 Hong Kong protest survey results not only reveal that the Hong Kong youth and educated are more technologically savvy than the regime, but also identify a demographic for the U.S. to support. Whether conducted overtly, covertly, clandestinely, or via a third party, social media targeting focused on the Hong Kong youth and educated population groups should prove to be the most effective means of influencing status quo change. Since autocratic regimes, such as the Chinese government, already suspect the U.S. is involved in Hong Kong's movement, the U.S. should not have to hide its support and should be able to play into the Chinese government's fear in an overt, low cost way. Providing external support to Hong Kong activists seems like a much more sensible strategy than criticizing the Chinese government for censoring its different forms of media. Formal criticism would likely escalate tensions, especially since China views the U.S. as backing many of the Hong Kong protests and does not want to acquiesce to any foreign presence, much less that of its nearest global competitor.

When dealing with a terrorist organization like DAIISH, it is important to remember that overreacting to social media tends to do more damage than does inaction. After analyzing over 400 terrorist groups, Audrey Kurth Cronin concluded that killing noncombatants through terrorist attacks have not proven to achieve strategic political ends, unless a state overreacts to this tactic.<sup>15</sup> DAIISH depends on U.S. responses to its propaganda in order to stay relevant and receive funding. By responding via social media in unconventional ways, the U.S. can better erode the power of DAIISH, instead of unintentionally ceding more power to it.

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15. Audrey Kurth Cronin, *How Terrorism Ends: Understanding the Decline and Demise of Terrorist Campaigns* (Princeton, NJ: Princeton University Press, 2009), 11.

Finally, recognizing social media's irregular character, via this thesis, has led the author to question whether U.S. Cyber Command (USCYBERCOM) would be better organized as a sub-unified command under the USSOCOM functional combatant command. Currently, USCYBERCOM is a sub-unified command organized under the authority of the USSTRATCOM functional combatant command. It seems that the current organizational model places USCYBERCOM under USSTRATCOM primarily because of the global scope of each, versus the functional characteristics of USCYBERCOM and USSOCOM that may be more appropriate. While outside the scope of this thesis, evaluating the organizational utility, feasibility, and concerns of realigning USCYBERCOM under USSOCOM instead of USSTRATCOM would make an interesting subject for additional research.



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